

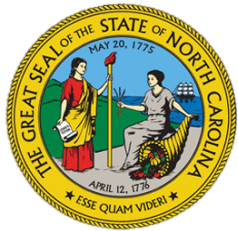
North Carolina COVID-19 Vaccine Management System (CVMS)

Provider Portal

Inventory Marketplace, Deprecation, Transfer, and Redistribution User Guide

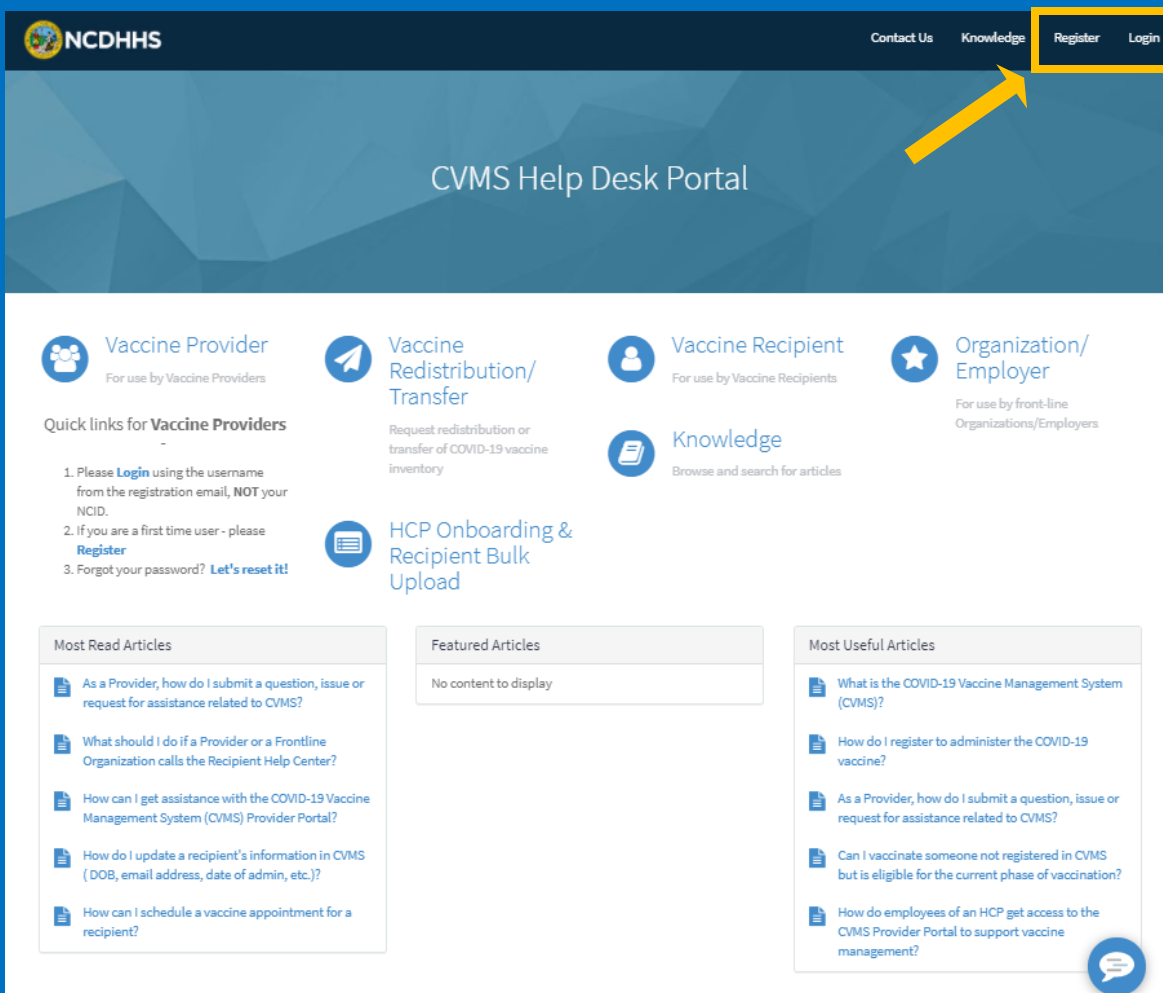
Version 15

July 15, 2021



NC DEPARTMENT OF
**HEALTH AND
HUMAN SERVICES**





If you have any questions, issues or requests, please go to the CVMS Help Desk Portal* at

https://ncgov.servicenowservices.com/csm_vaccine

You can also call the COVID-19 Vaccine Provider Help Desk at **(877) 873-6247** and select option 1.

The COVID-19 Vaccine Provider Help Desk is available during the following hours:

Monday to Friday: 7 am – 7 pm ET

Saturday & Sunday: 10 am – 6 pm ET

* On the home page of the CVMS Help Desk Portal, select Login at the top right-hand corner, then select the "**Vaccine Provider**" option to submit your question, issue, or request.

Providers that are first time users of the CVMS Help Desk Portal will have to follow the steps below:

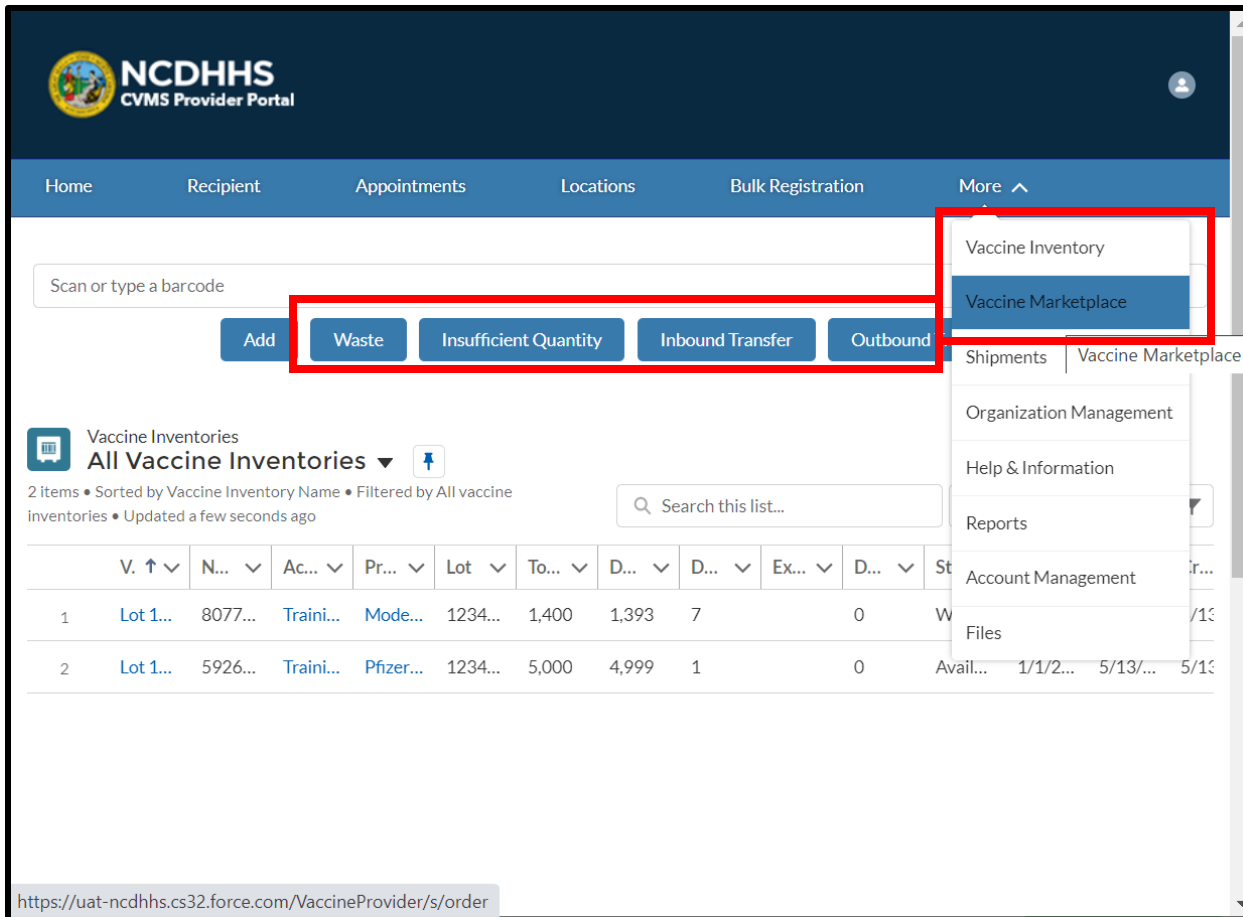
1. Register for an account on the portal by clicking 'Register' in the top right-hand corner
2. Populate your first name, last name, and business e-mail
3. You will receive an e-mail with your username and temporary password to log into the portal

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Overview

Overview



The screenshot shows the NCDHHS CVMS Provider Portal. The 'More' dropdown menu is open, highlighting the 'Vaccine Marketplace' option. Below the menu, there is a table of vaccine inventories.

	V. ↑ ↓	N... ↓	Ac... ↓	Pr... ↓	Lot ↓	To... ↓	D... ↓	D... ↓	Ex... ↓	D... ↓	St
1	Lot 1...	8077...	Traini...	Mode...	1234...	1,400	1,393	7		0	W
2	Lot 1...	5926...	Traini...	Pfizer...	1234...	5,000	4,999	1		0	Avail...

To provide NCDHHS with an accurate picture of the COVID-19 vaccine inventory available across all provider locations, you will need to update the CVMS Provider Portal with COVID-19 vaccine inventory reductions, deprecations, and transfers / redistributions to other providers or other locations within your organization.

If you have a surplus of COVID-19 vaccine doses or if you need additional COVID-19 vaccine doses, use the **VACCINE MARKETPLACE** to directly coordinate with another provider and agree to transfer COVID-19 vaccine doses.

The processes discussed in this training guide are primarily for users with a **Healthcare Location Manager** profile.

You will also need to:

- Use the latest version of Chrome, Edge Chromium, Firefox, or Safari browsers. Internet Explorer or older versions of Edge (non-Chromium) browsers are not supported.
- Log into the CVMS Provider Portal at <https://covid-vaccine-provider-portal.ncdhhs.gov> using your NCID username and password.

Now, let's get started!

Search the Vaccine Marketplace

What is the Vaccine Marketplace?

The “Vaccine Marketplace” enables providers to self-identify and match COVID-19 vaccine needs with other providers; this feature supports the transfer of COVID-19 vaccine from **provider to provider**.

SUPPLY

Providers with extra COVID-19 vaccine doses can:

- Search the Vaccine Marketplace for a nearby provider in need of extra COVID-19 vaccine doses
- If provider is identified, contact is made via phone or email
- If provider is not located, marketplace post of extra dose availability can be created

DEMAND

Providers seeking extra COVID-19 vaccine doses can:

- Search the Vaccine Marketplace for a nearby provider offering extra COVID-19 vaccine doses
- If provider is identified, contact is made via phone or email
- If provider is not located, marketplace post with quantity and vaccine brand needed can be created

Once providers reach an agreement on moving COVID-19 vaccine doses, the existing transfer process in the CVMS Provider Portal is followed to complete the transaction.

What is a Hub?

Providers can also send extra doses to a Hub and obtain new doses from a Hub.

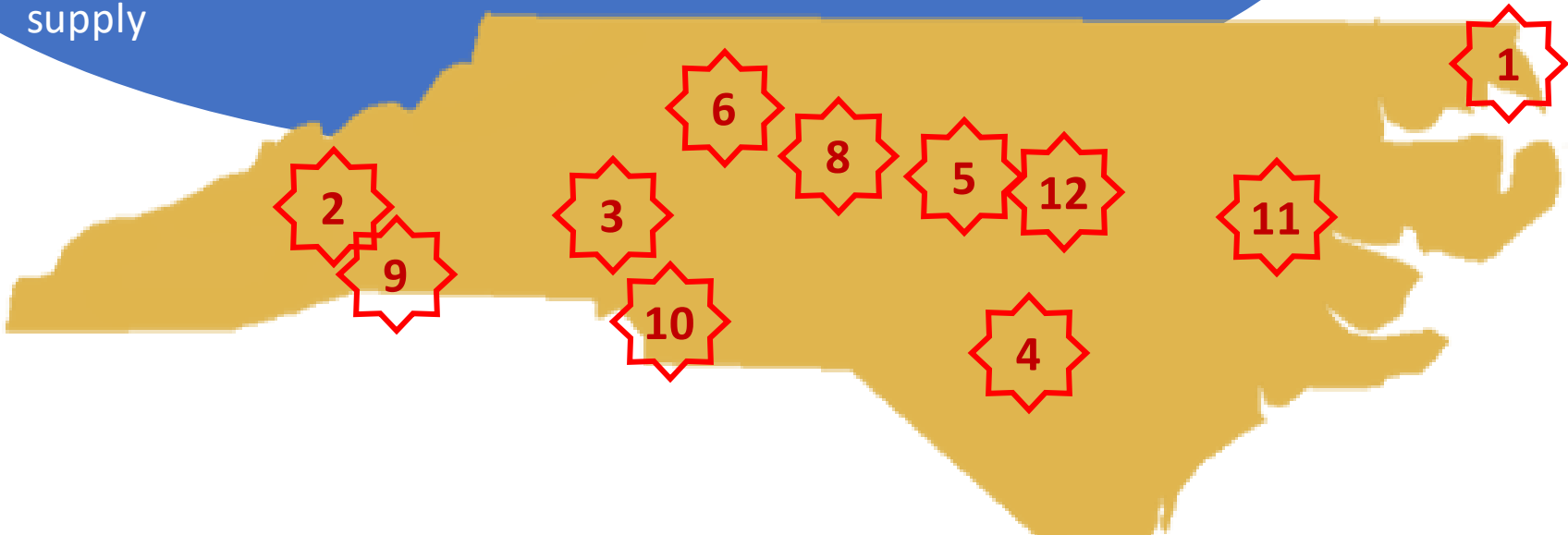
What is a Hub?

- Hubs are locations contracted by NCDHHS to serve as COVID-19 **vaccine repositories**. Hubs consolidate vaccine inventories that are dispersed among multiple providers.
- These designated Hubs are also able to deliver and/or facilitate COVID-19 vaccine pickups if a transfer is requested.

Which hub should you contact?

- Contact your assigned Hub (see [“Find your associated Hub”](#) in this document), or the Hub closest to your location
- Filter the Vaccine Marketplace on your Hub to check their supply

Hub 1	Currituck County Health Department	Currituck
Hub 2	Buncombe County Health and Human Services	Buncombe
Hub 3	Catawba County Public Health	Catawba
Hub 4	Cumberland County Health Department	Cumberland
Hub 5	Durham County Health Department	Durham
Hub 6	Forsyth County Health Department	Forsyth
Hub 8	Moses H. Cone Memorial Hospital	Guilford
Hub 9	Henderson County Health Department	Henderson
Hub 10	StarMed Family & Urgent Care - Freemore	Freemore
Hub 11	Vidant Medical Center	Pitt
Hub 12	Wake County Human Services	Wake



Search and Post Request in the Vaccine Marketplace

Home

Recipient

Appointments

Locations

Bulk Registration

Vaccine Inventory

Vaccine Marketplace

Shipments

More

You can utilize Vaccine Marketplace to facilitate transfers with other enrolled providers in your area. If you need additional vaccines for your provider location, please utilize the 'Seek Transfer Match' to identify a location near you to facilitate a transfer. If you are looking to transfer out additional on-hand vaccine inventory, please utilize the 'Seek Transfer Match' to document the amount of inventory you have on hand to transfer out. Please note, you will need to coordinate directly with the other provider to coordinate vaccine transport.

If no transfer is available to fulfill your provider location's needs, please submit a vaccine allocation request through the [NC DHHS Vaccination Allocation Request Form](#).

Note there are several Seek Transfer 'List Views' available to help you filter by Request Type & Status. The 'My Seek Transfer Matches' can be used to view records you have created. You can save your favorite view as your default by clicking the pin icon. You can modify your display between Table & Kanban view by clicking the grid icon.

New Seek Transfer Match

Orders

Seek Transfer Match - All

164 items • Sorted by Order Number • Filtered by All orders - Order Record Type • Updated a few seconds ago

Order ...

Request ...

Status

St...

Account ...

County

City

Product

Br...

Dose...

Hub?

Pri...

Created ...

Last Mod...

90

☐

ORD-00...

Extra (to ...

Active

DoNotUs...

Alexander

vik

Modern...

20

Yes(Hub 1)

6/11/20...

6/11/20...

91

☐

ORD-00...

Wanted (...

Closed/I...

RPA Loc 1

Moderna

1,400

6/11/20...

6/11/20...

92

☐

ORD-00...

Extra (to ...

Auto-Lap...

RPA Loc 1

Modern...

14

6/11/20...

6/18/20...

93

☐

ORD-00...

Wanted (...

Auto-Lap...

RPA Loc 1

Moderna

1,400


6/11/20...

6/18/20...

All Users with a Healthcare Location Manager Profile have access to the Vaccine Marketplace via **the Vaccine Marketplace tab**.

You can **search** other providers in your area with extra inventory ready to transfer out *OR* providers near you seeking inventory by COVID-19 vaccine product.

Hubs will also use the Vaccine Marketplace to list the Extra Doses they have at hand.

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Find your Associated Hub


Step 1 of 3: Find Your Account Record

The NCDHHS team will assign COVID-19 vaccine providers to the different Hubs around the State. If you have doubts on the Hub assigned to your location, follow these instructions.

- 1. Navigate to the **LOCATIONS** tab

Audience

Healthcare
Location Manager



Home

Recipient

Appointments

Locations

Bulk Registration

Vaccine Inventory

Vaccine Marketplace

Shipments

More

You are currently logged in as RPA Loc 1

Switch Locations

Recipient Check-In

You can check in a recipient by entering their appointment confirmation number into the box below

Appointment Confirmation Number

Go

No Appointment Confirmation Number?

Search Appointments

Today's Appointments

TIME	DETAILS	CASE NUMBER	LOCATION
------	---------	-------------	----------

Step 2 of 3: Open your Location Account Record

- 1. Click on the **ACCOUNT NAME** (not on the Location Name)

HomeRecipientAppointmentsLocationsBulk RegistrationVaccine InventoryVaccine MarketplaceShipmentsMore

NewEnable Scheduling

Filter by Name

Filter by Address

Filter by Start Date

Filter by Closing Date

Location Name	Account	Address	Start Date	Closing Date
Walmart Store- UAT - Do Not Use	TestLoc_UAT1	3633 Clemmons Rd, Clemmons, North Carolina 27012-8725 336-293-1395		
Pop-Up Clinic	Training Team Vaccine Provider - Site 2	123 Test Dr, Raleigh, North Carolina 27609 111-111-1111		
Training Team Vaccine Provider - Site 2	Training Team Vaccine Provider - Site 2	1 fayetteville street, Raleigh, North Carolina 27601 123456789		

Audience

Healthcare
Location Manager

Step 3 of 3: Find the Primary Hub Associated to Your Location

- 1. Select the **DETAILS** tab
- 2. Scroll to the bottom to view **HUB INFORMATION**
- 3. The Hub allocated to your location will appear under **PRIMARY HUB ASSOCIATED TO THIS LOCATION**

HomeRecipientAppointmentsLocationsBulk RegistrationVaccine InventoryVaccine MarketplaceShipmentsMore

Account
TestLoc_UAT1

Bulk Employee UploadChange Allocation Availability

Available to Receive Vaccine Allocation

Instructions (Available to Receive Vacs)
Please ensure field 'Available to Receive Vaccine Allocation' is correct each week. 'Yes' means the site is able to receive and administer additional vaccine if allocated. A value of 'No' means the site does not wish to receive vaccine or is not able to receive and administer additional vaccine at that time if allocated and the site will not be considered for allocation. This value can be changed at any time, so if you wish to skip one week for any reason (i.e. sufficient supply for next week or storage is at capacity), mark this value as 'No' by Monday 10am for allocation planning that week. If you would like to be considered for allocation, you should have the value set at 'yes' by 10AM on Mondays. The value will STAY in place until a site adjusts it (i.e. if you select 'No,' it will remain 'No' until the next Monday 10am).

DETAILS

RELATED

Hub Information (for Vaccine Marketplace & Transfers)

Hub

Primary Hub Associated to this Location

Hub 1

Transport: Pickup, Deliver, or Both?

DHHS Liaison (Hub)

Coverage Type (Hub)

Notes (Hub)

Audience

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Location Manager

Tips

If your location is currently not assigned to a Hub, the field will be either empty or filled with **INDETERMINED**. If it is the case, feel free to contact the Hub of your choice to confirm if they can support you.

Offer your Vaccine Surplus


Step 1 of 13: Navigate to the Vaccine Marketplace

If you have a surplus of COVID-19 vaccine doses, first contact your assigned Hub to check if they can collect them from you. If not, check if other providers in your area are looking for COVID-19 vaccine doses. If you don't find any, you can post a request on your own in the Vaccine Marketplace.

- 1. At the top of your home page, click on the **VACCINE MARKETPLACE**

Audience

Healthcare
Location Manager



Home

Recipient

Appointments

Locations

Bulk Registration

Vaccine Inventory

Vaccine Marketplace

Shipments

More

You are currently logged in as RPA Loc 1

Switch Locations

Recipient Check-In

You can check in a recipient by entering their appointment confirmation number into the box below

Appointment Confirmation Number

Go

No Appointment Confirmation Number?

Search Appointments

Today's Appointments

TIME	DETAILS	CASE NUMBER	LOCATION
------	---------	-------------	----------

Step 2 of 13: View All Available And Active Requests

1. Locate **ORDERS** and click on the drop-down menu to change the view

Home

Recipient

Appointments

Locations

Bulk Registration

Vaccine Inventory

Vaccine Marketplace

Shipments

More ▾

You can utilize Vaccine Marketplace to facilitate transfers with other enrolled providers in your area. If you need additional vaccines for your provider location, please utilize the 'Seek Transfer Match' to identify a location near you to facilitate a transfer.

If you are looking to transfer out additional on-hand vaccine inventory, please utilize the 'Seek Transfer Match' to document the amount of inventory you have on hand to transfer out. Please note, you will need to coordinate directly with the other provider to coordinate vaccine transport.

If no transfer is available to fulfill your provider location's needs, please submit a vaccine allocation request through the [NC DHHS Vaccination Allocation Request Form](#).

Note there are several Seek Transfer 'List Views' available to help you filter by Request Type & Status. The 'My Seek Transfer Matches' can be used to view records you have created. You can save your favorite view as your default by clicking the pin icon.

You can modify your display between Table & Kanban view by clicking the grid icon.

New Seek Transfer Match

Orders

Seek Transfer Match - All ▾ 🔓

164 items • Sorted by Order Number • Filtered by All orders - Order Record Type • Updated 8 minutes ago

Order ... ↑ ▾

Request ... ▾

Status ▾

St... ▾

Account ... ▾

County ▾

City ▾

Product ▾

Br... ▾

Dose... ▾

Hub? ▾

Pri... ▾

Created ... ▾

Last Mod... ▾

🔍 Search this list...

⚙️ ▾

🗃️ ▾

↺

✎

📊

🏠

- ## 2. Select **SEEK TRANSFER MATCH – WANTED** (Active)

Orders

Seek Transfer Match - Wanted (Active) ▼

1 item • Sorted by Order Number • Filtered by All

orders Updated

1

Seek Transfer Match - All (Active)

Seek Transfer Match - Extra (Active)


✓ Seek Transfer Match - Wanted (Active)

ALL OTHER LISTS

Audience

Healthcare Location Manager

Tips

To always see the available and active requests, set the view to **SEEK TRANSFER MATCH-ALL**, and use the pin icon  to set this as your default view.

Step 3 of 13: Sort Inventories by Location

To find a provider near your location, sort the inventories by location.

- 1. Click on the Header Row fields **CITY**, **COUNTY**, or **HUB?** to sort the records in ascending or descending order by location

Audience

Healthcare
Location Manager

HomeRecipientAppointmentsLocationsBulk RegistrationVaccine InventoryVaccine MarketplaceShipmentsMore

You can utilize Vaccine Marketplace to facilitate transfers with other enrolled providers in your area. If you need additional vaccines for your provider location, please utilize the 'Seek Transfer Match' to identify a location near you to facilitate a transfer. If you are looking to transfer out additional on-hand vaccine inventory, please utilize the 'Seek Transfer Match' to document the amount of inventory you have on hand to transfer out. Please note, you will need to coordinate directly with the other provider to coordinate vaccine transport.

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New Seek Transfer Match

Orders

Seek Transfer Match - All

164 items • Sorted by Order Number • Filtered by All orders - Order Record Type • Updated 11 minutes ago

Order ...

Request ...

Status

St...

Account ...

County

City

Product

Br...


Dose...

Hub?

Pri...

Created ...

Last Mod...



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Step 4 of 13: Select the Request that Match Your Offer

After sorting your results, navigate the list to find the inventory request that appears to best match the surplus inventory you have to offer.

- 1. Click on the **ORDER NUMBER** associated with the request

Audience

Healthcare
Location Manager

HomeRecipientAppointmentsLocationsBulk RegistrationVaccine InventoryVaccine MarketplaceShipmentsMore

You can utilize Vaccine Marketplace to facilitate transfers with other enrolled providers in your area. If you need additional vaccines for your provider location, please utilize the 'Seek Transfer Match' to identify a location near you to facilitate a transfer. If you are looking to transfer out additional on-hand vaccine inventory, please utilize the 'Seek Transfer Match' to document the amount of inventory you have on hand to transfer out. Please note, you will need to coordinate directly with the other provider to coordinate vaccine transport.

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Note there are several Seek Transfer 'List Views' available to help you filter by Request Type & Status. The 'My Seek Transfer Matches' can be used to view records you have created. You can save your favorite view as your default by clicking the pin icon. You can modify your display between Table & Kanban view by clicking the grid icon.

New Seek Transfer Match

Orders

Seek Transfer Match - All

50+ items • Sorted by Order Number • Filtered by All orders - Order Record Type • Updated a few seconds ago

Search this list...

<input type="checkbox"/>	Order ...	Request ...	Status	St...	Account ...	County	City	Product	Br...	Dose...	Hub?	Pri...	Created ...	Last Mod...	
90	<input type="checkbox"/> ORD-001...	Wanted (t...	Active		DoNotUs...	Yadkin	Iceland	Pfizer-Bi...		0			7/15/202...	7/15/202...	
91	<input type="checkbox"/> ORD-001...	Extra (to ...	Active		DoNotUs...	Yadkin	Iceland	TestVacci...		90			7/15/202...	7/15/202...	
92	<input type="checkbox"/> ORD-001...	Wanted (t...	Active		DoNotUs...	Yadkin	Iceland	Pfizer-Bi...		0			7/15/202...	7/15/202...	
93	<input type="checkbox"/> ORD-001...	Extra (to ...	Active		DoNotUs...	Yadkin	Iceland	TestVacci...		90			7/15/202...	7/15/202...	
94	<input type="checkbox"/> ORD-001...	Extra (to ...	Active		DoNotUs...	Yadkin	Iceland	TestVacci...		90			7/15/202...	7/15/202...	
95	<input type="checkbox"/> ORD-001...	Extra (to ...	Closed/In...		DoNotUs...	Alexander	Vik, Iceland	Moderna ...		10	Yes(Hub 1)		6/2/2021...	6/4/2021...	
96	<input type="checkbox"/> ORD-001...	Extra (to ...	Closed/In...		DoNotUs...	Alexander	Vik, Iceland	Moderna ...		10	Yes(Hub 1)		6/2/2021...	6/7/2021...	

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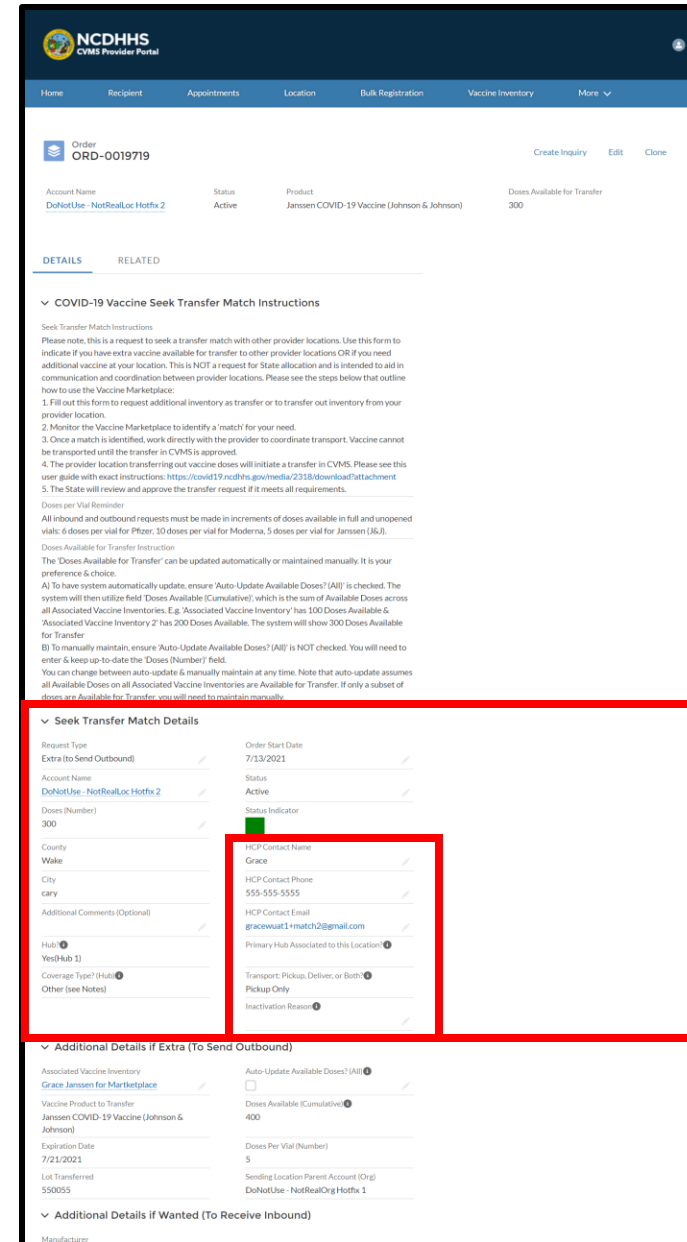
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Step 5 of 13: Review the Inventory Details

Review the inventory details, and contact the other provider directly using the **HCP CONTACT PHONE** and **HCP CONTACT EMAIL**.

If an agreement is reached to transfer COVID-19 vaccine doses, you can **initiate an Outbound Transfer** ([Click here to read the instructions on the Outbound Transfer Process located in this user guide](#)).

Please also check the NCDHHS guidance for transport of COVID-19 vaccine at <https://covid19.ncdhhs.gov/media/3070/download?attachment>



NCDHHS CVMS Provider Portal

Home Recipient Appointments Location Bulk Registration Vaccine Inventory More

Order ORD-0019719 Create Inquiry Edit Clone

Account Name: DoNotUse - NotRealLoc Hotfix 2 Status: Active Product: Janssen COVID-19 Vaccine (Johnson & Johnson) Doses Available for Transfer: 300

DETAILS RELATED

COVID-19 Vaccine Seek Transfer Match Instructions

Seek Transfer Match Instructions

Please note, this is a request to seek a transfer match with other provider locations. Use this form to indicate if you have extra vaccine available for transfer to other provider locations OR if you need additional vaccine at your location. This is NOT a request for State allocation and is intended to aid in communication and coordination between provider locations. Please see the steps below that outline how to use the Vaccine Marketplace:

- Fill out this form to request additional inventory as transfer or to transfer out inventory from your provider location.
- Monitor the Vaccine Marketplace to identify a 'match' for your need.
- Once a match is identified, work directly with the provider to coordinate transport. Vaccine cannot be transported until the transfer in CVMS is approved.
- The provider location transferring out vaccine doses will initiate a transfer in CVMS. Please see this user guide with exact instructions: <https://covid19.ncdhhs.gov/media/2318/download?attachment>
- The State will review and approve the transfer request if it meets all requirements.

Doses per Vial Reminder

All inbound and outbound requests must be made in increments of doses available in full and unopened vials: 6 doses per vial for Pfizer, 10 doses per vial for Moderna, 5 doses per vial for Janssen (J&J).

Doses Available for Transfer Instruction

The 'Doses Available for Transfer' can be updated automatically or maintained manually. It is your preference & choice.

A) To have system automatically update, ensure 'Auto-Update Available Doses?' (All) is checked. The system will then utilize field 'Doses Available (Cumulative)', which is the sum of Available Doses across all Associated Vaccine Inventories. E.g. 'Associated Vaccine Inventory' has 100 Doses Available & 'Associated Vaccine Inventory 2' has 200 Doses Available. The system will show 300 Doses Available for Transfer


B) To manually maintain, ensure 'Auto-Update Available Doses?' (All) is NOT checked. You will need to enter & keep up-to-date the 'Doses (Number)' field.

You can change between auto-update & manually maintain at any time. Note that auto-update assumes all Available Doses on all Associated Vaccine Inventories are Available for Transfer. If only a subset of doses are Available for Transfer, you will need to maintain manually.

Seek Transfer Match Details

Request Type: Extra (To Send Outbound) ✓ Order Start Date: 7/13/2021 ✓


Account Name: DoNotUse - NotRealLoc Hotfix 2 ✓ Status: Active ✓

Doses (Number): 300 ✓ Status Indicator: 

County: Wake ✓

City: Cary ✓

Additional Comments (Optional): ✓


Hub:  Yes (Hub 1) ✓

Coverage Type? (Hub): Other (see Notes) ✓


HCP Contact Name: Grace ✓

HCP Contact Phone: 555-555-5555 ✓

HCP Contact Email: graceuat1+match2@gmail.com ✓

Primary Hub Associated to this Location:  ✓

Transport: Pickup, Deliver, or Both: Pickup Only ✓

Inactivation Reason:  ✓

Additional Details if Extra (To Send Outbound)

Associated Vaccine Inventory: Grace Janssen for Marketplace ✓

Vaccine Product to Transfer: Janssen COVID-19 Vaccine (Johnson & Johnson) ✓

Expiration Date: 7/23/2021 ✓

Lot Transferred: 550055 ✓


Auto-Update Available Doses? (All): ☐ ✓

Doses Available (Cumulative): 400 ✓

Doses Per Vial (Number): 5 ✓

Sending Location Parent Account (Org): DoNotUse - NotRealOrg Hotfix 1 ✓

Additional Details if Wanted (To Receive Inbound)

Manufacturer: 

Audience

Healthcare
Location Manager

Step 6 of 13: Initiate a New Seek Transfer Match

If no provider is looking for the type of COVID-19 vaccine product you are offering, post an extra dose availability in the Vaccine Marketplace to let other providers know that you can support them.

1. Navigate to the **VACCINE MARKETPLACE** tab
2. Click on **NEW SEEK TRANSFER MATCH**

HomeRecipientAppointmentsLocationsBulk RegistrationVaccine InventoryVaccine MarketplaceShipmentsMore

You can utilize Vaccine Marketplace to facilitate transfers with other enrolled providers in your area. If you need additional vaccines for your provider location, please utilize the 'Seek Transfer Match' to identify a location near you to facilitate a transfer. If you are looking to transfer out additional on-hand vaccine inventory, please utilize the 'Seek Transfer Match' to document the amount of inventory you have on hand to transfer out. Please note, you will need to coordinate directly with the other provider to coordinate vaccine transport.

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Note there are several Seek Transfer 'List Views' available to help you filter by Request Type & Status. The 'My Seek Transfer Matches' can be used to view records you have created. You can save your favorite view as your default by clicking the pin icon. You can modify your display between Table & Kanban view by clicking the grid icon.

New Seek Transfer Match

Orders

Seek Transfer Match - All (Active)

6 items • Sorted by Order Number • Filtered by All orders - Status, Order Record Type • Updated a few seconds ago

Order Nu...

↑

▼

Request Type

▼

Account Name

▼

County

▼

City

▼

Product

▼

Br...

▼

Doses Av...

▼

Expiration...

▼

Hub?

▼

Primary ...

▼

Created Date

▼

La

1

☐

ORD-0017354

Extra (to Send ...

DoNotUse - QA...

Alexand...

vik

Moderna (14 d...

moderna

20

6/15/2021

Yes(Hub 1)

6/11/2021, 12:...

6/

2

☐

ORD-0017361

Extra (to Send ...

DoNotUse - QA...

Alexand...

vik

Moderna (14 d...

moderna

20

6/15/2021

Yes(Hub 1)

6/14/2021, 11:...

6/

3

☐

ORD-0017445

Extra (to Send ...

DoNotUse - QA...

Alexand...

vik

Moderna (10 d...

moderna

2

6/30/2021

Yes(Hub 1)

6/28/2021, 2:0...


6/

Audience

Healthcare
Location Manager

Tips

Before placing a Seek Transfer Match, it is recommended that you contact your associated Hub to discuss your needs.

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Step 7 of 13: Start completing the “Seek Transfer Match” Form

New Order: Seek Transfer Match

COVID-19 Vaccine Seek Transfer Match Instructions

Seek Transfer Match Instructions

Please note, this is a request to seek a transfer match with other provider locations. Use this form to indicate if you have extra vaccine available for transfer to other provider locations OR if you need additional vaccine at your location. This is NOT a request for State allocation and is intended to aid in communication and coordination between provider locations. Please see the steps below that outline how to use the Vaccine Marketplace:

1. Fill out this form to request additional inventory as transfer or to transfer out inventory from your provider location.
2. Monitor the Vaccine Marketplace to identify a 'match' for your need.
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4. The provider location transferring out vaccine doses will initiate a transfer in CVMS. Please see this user guide with exact instructions: <https://covid19.ncdhhs.gov/media/2318/download?attachment>
5. The State will review and approve the transfer request if it meets all requirements.

Doses per Vial Reminder

All inbound and outbound requests must be made in increments of doses available in full and unopened vials: 6 doses per vial for Pfizer, 10 doses per vial for Moderna, 5 doses per vial for Janssen (J&J).

Seek Transfer Match Details

* Request Type
Extra (to Send Outbound)

* Order Start Date
6/9/2021

* Account Name
Training Team Vaccine Provider - Site 1

* Status
Active

* Doses (Number)
400

* HCP Contact Name
Peter Pan

* HCP Contact Phone
111-222-3333

Additional Comments (Optional)
There are 2 different lots available:
300 doses expiring in July 15, 2021 // 100 doses expiring in November 30, 2021

1. Read the instructions at the top of window
2. Complete the required fields:
 - **Request Type:** select “Extra (to Send Outbound)”
 - **Order Start Date:** enter today’s date
 - **Account Name:** select your location account name
 - **Status:** select **ACTIVE**
 - **Doses:** enter the number of doses you are offering
 - **HCP Contact Name/phone/email:** who to contact to agree on the transfer
 - **Additional Comments:** be as detailed as possible. For example, “These Extra doses of 400 doses are split over six separate inventories. Here are the number of doses per lot and expiration date: xxx – xx/xxxx”

Audience

Healthcare
Location Manager

Step 8 of 13: Select the Associated Inventory

New Order: Seek Transfer

Checked will copy "Available Doses (Cumulative)" into this field, which is the sum of Doses Available across all Associated Vaccine Inventories. Leaving unchecked means you will manually keep this number up-to-date via the "Doses (Number)" field.

Additional Details if Extra (To Send Outbound)

Associated Vaccine Inventory

111111 Delivery 06/23/2021

Auto-Update Available Doses? (All)

Manufacturer

--None--

Requesting Provider to check box below to confirm adherence to each requirement:

Adherence to all Requirements

Requirement 1 (Seek Transfer Match)

Please confirm you have read and reviewed the latest CDC Shipping and Handling guidance for vaccine transport: <https://www.cdc.gov/vaccines/hcp/admin/storage/toolkit/storage-handling-toolkit.pdf>

Requirement 2 (Seek Transfer Match)

All transfer matches will be provider initiated and led. Providers will be responsible for documenting the transfer in CVMS and coordinating the physical transport of the vaccine. The State will not be available to support any physical transport of vaccine in a transfer match request made through the Vaccine Marketplace as DHHS is not monitoring this forum for requests for State support. Providers in need of vaccine who are unable to secure doses following the conditions outlined within the Vaccine Marketplace will need to submit a vaccine allocation request through the NC DHHS Vaccination Allocation Request Form.

Cancel Save & New Save

1. Scroll down and complete the bottom of the form:

- **Associated Vaccine Inventory:** select the lot number you are offering. See previous slide if you wish to submit multiple inventories of the same brand
- **Auto-update Available Doses? (All):** (OPTIONAL) select this box if you would like to automatically update the available doses in the match based on doses available reflected in CVMS
- **Adherence to all Requirements:** read requirements 1 and 2 and select the checkbox to agree to them

Audience

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Location Manager

Tips

Auto-updating available doses is optional. If you choose this option, the match will automatically update the available doses of your listing to reflect what is within CVMS. This can be especially helpful if you link multiple inventories to a single match, particularly if part of the inventory is used before the match is closed.

Step 9 of 13: Submit the “Seek Transfer Match” Form

New Order: Seek Transfer Match

Additional Details if Extra & Doses across multiple Vaccine Inventories

Associated Vaccine Inventory 2 ⓘ
Search Vaccine Inventories...

Associated Vaccine Inventory 3 ⓘ
Search Vaccine Inventories...

Associated Vaccine Inventory 4 ⓘ
Search Vaccine Inventories...

Associated Vaccine Inventory 5 ⓘ
Search Vaccine Inventories...

Associated Vaccine Inventory 6 ⓘ
Search Vaccine Inventories...

Associated Vaccine Inventory 7 ⓘ
Search Vaccine Inventories...

Associated Vaccine Inventory 8 ⓘ
Search Vaccine Inventories...

System Information

Order Record Type
Seek Transfer Match

Order Owner
Darrell Lee

Cancel

Save & New

Save


- 1. Enter any additional associated inventories (if an Extra Seek Transfer Match)
- 2. Click **SAVE**

Audience

Healthcare
Location Manager

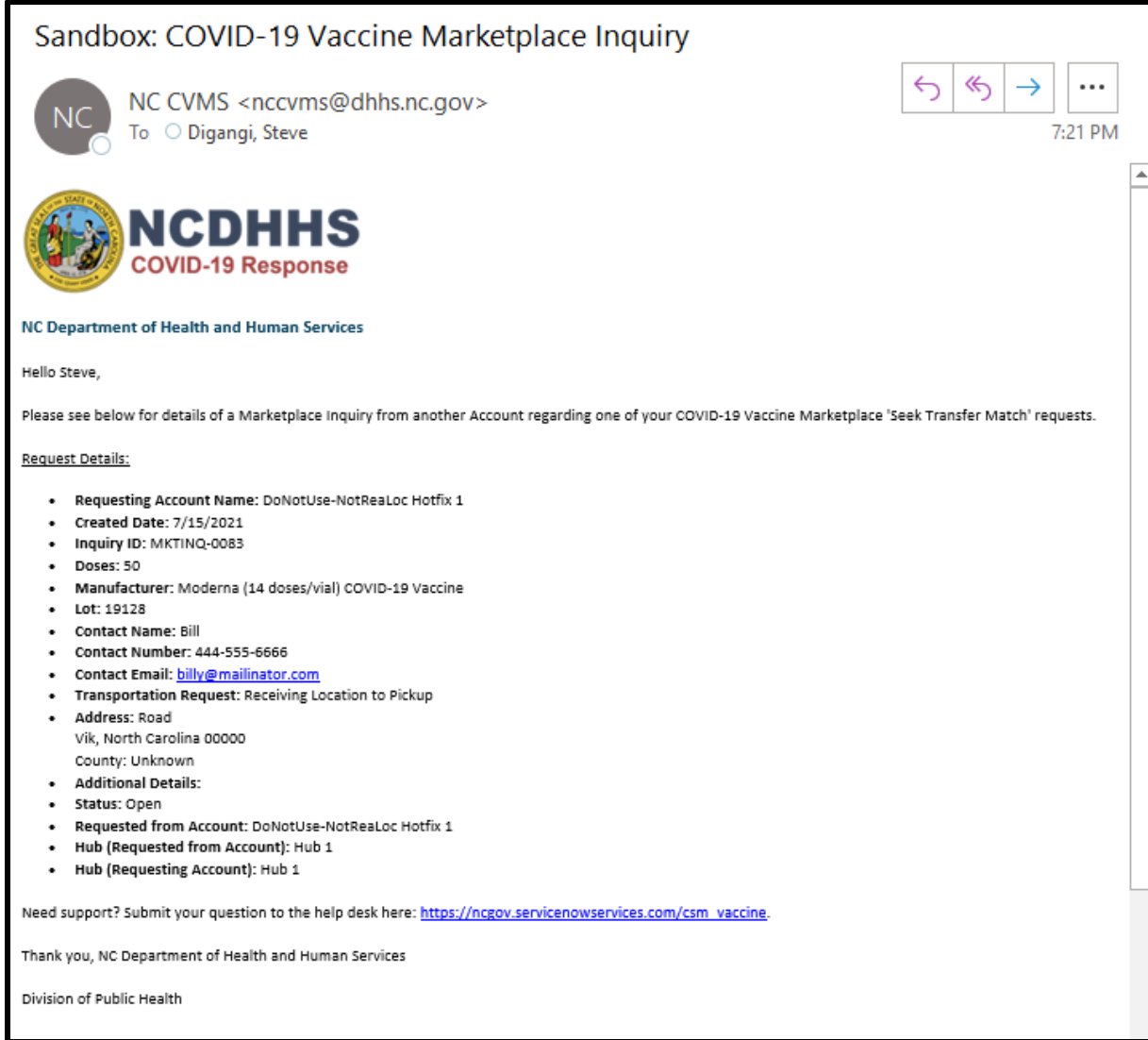
Tips

So long as the inventories are from the same lot and allocated by the State only, or the federal authority only, you can combine inventories to create a single Extra Seek Transfer Match instead of having to create multiple matches.

 NC DEPARTMENT OF
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Step 10 of 13: Receive an Inquiry from Another Provider



If another provider is interested in the COVID-19 vaccines that you are offering, you might receive an email with the details of their need, their address, and other information.

This e-mail is the result of a provider inquiry in CVMS.

Audience

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Location Manager

Step 11 of 13: View the Inquiry in CVMS

You can see all the inquiries you received on a listing. To do so,

- 1. Open the listing record in the **VACCINE MARKETPLACE**
- 2. Click on the **RELATED** tab
- 3. View the list of Marketplace Inquiries
- 4. Open them by clicking on the Marketplace Inquiry Name Link

HomeRecipientAppointmentsLocationsBulk RegistrationVaccine InventoryVaccine MarketplaceShipmentsMore

OrderORD-0019684

Create InquiryEditClone

Account NameDoNotUse-NotReaLoc Hotfix 1

StatusActive

ProductModerna (14 doses/vial) COVID-19 Vaccine

Doses Available for Transfer1,000

Auto-Update Available Doses? (All)☐

Order Start Date7/1/2021

DETAILS

RELATED

Marketplace Inquiries (6+)

New

Marketplace Inquiry Name	Status	Requesting Account	Doses Requested
MKTINQ-0000	Open	TestLoc-DoNotUse2	12,345
MKTINQ-0003		TestLoc1-DoNotUse	50
MKTINQ-0004	Open	712PE	10
MKTINQ-0006	Open	TestLoc-DoNotUse2	100
MKTINQ-0007	Open		
MKTINQ-0027	Open	DoNotUseVJLoc1_hotfix1	140

View All

Audience

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Location Manager

Tips

Once you contacted the inquirer, you can **EDIT** the **INQUIRY** and update the status to **COMPLETED** or **REJECTED BY REVIEWER**.

Status

Rejected by Reviewer

--None--

Open

Completed

Cancelled by Requestor

☒ Rejected by Reviewer

test.123@plubj.com

Transfer Warning

Save

Step 12 of 13: Close Your Listing

DETAILS

RELATED

COVID-19 Vaccine Seek Transfer Match Instructions

Seek Transfer Match Instructions

Please note this is a request to seek a transfer match with other provider locations. Please use this form to indicate if you have extra vaccine available for transfer to other provider locations OR if you need additional vaccine at your location. This is NOT a request for State allocation and the State will not be regularly viewing these. It is intended to aid in communication between provider locations.

Doses per Vial Reminder

All inbound and outbound requests must be made in increments of doses available in full and unopened vials: 6 doses per vial for Pfizer, 10 doses per vial for Moderna, 5 doses per vial for Janssen (J&J).

Seek Transfer Match Details

* Request Type

Extra (to Send Outbound)

* Account Name

DoNotUse - QALoc1

* Doses (Number)

10

County

City

* Order Start Date

5/24/2021

* Status

Active

--None--

Active

Closed/Inactive

Auto-Lapsed (Old)

Incomplete

111-111-1111

If a local provider contacts you and you are in agreement with the conditions of transfer, you can **initiate an Outbound Transfer** ([Click here for instructions on the transfer in this user guide](#)).

When the transfer has been agreed on, close your Order in the Vaccine Marketplace:

1. Navigate to the **Vaccine Marketplace** tab
2. Filter the view on

Orders

My Seek Transfer Matches
3. Open the form
4. Click on **EDIT** at the top right
5. Change the Status to **CLOSED/INACTIVE**

Audience

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Location Manager

Tips

Your form will automatically change to an auto-lapsed status after 21 days. To extend, see the section named “[Maintain Your Requests Posted in the Vaccine Marketplace](#)”. The auto-lapse email will go to the email address associated to your NCID, not the email you enter in the form.

Step 13 of 13: Set Inactivation Reason

▼ Seek Transfer Match Details

* Request Type
Extra (to Send Outbound)

* Order Start Date
7/1/2021

* Account Name
DoNotUse-NotReaLoc Hotfix 1

* Status
Closed/Inactive

Doses (Number)
1,000

Country
Unknown

City
Vik

Additional Comments (Optional)

Hub? 1
Yes(Hub 1)

Coverage Type? (Hub) 1
Regional

* HCP Contact Name
Nicole HCP Tester

* HCP Contact Phone
800-128-4219

* HCP Contact Email
joshuakemp85@gmail.com

Primary Hub Associated to this Location? 1
Pickup Only

Transport: Pickup, Deliver, or Both? 1
Pickup Only

Inactivation Reason 1
--None--
Completed (single Transfer)
Completed (multiple Transfers)
Fulfilled w/o using Marketplace
Unfulfilled or No longer applicable
Created in Error
Auto-Lapsed (Weeks w/o Modification)
Auto-Lapsed (Expiration Date past)

▼ Additional Details if Extra (To Send Outbound)

Associated Vaccine Inventory
Delivery 06/14/2021

Vaccine Product to Transfer
Moderna (14 doses/vial) COVID-19 Vaccine

Expiration Date
8/31/2021

Lot Transferred
19128

▼ Additional Details if Wanted (To Receive)

Cancel Save

When the seek transfer match is closed, identify the reason. Navigate to the **Vaccine Marketplace** tab

1. Navigate to the **INACTIVATION REASON**
2. Open the pick list
3. Select the appropriate reason
4. Click **SAVE**

Audience

Healthcare
Location Manager

Request Additional Vaccines


Step 1 of 16: Navigate to the Vaccine Marketplace

If you need additional COVID-19 vaccine doses, first check in the Vaccine Marketplace if your assigned Hub can support you. If not, check if other providers in your area are offering extra doses in the Vaccine Marketplace. If you don't find any, you can post a request on your own.

Audience

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Location Manager

1. At the top of your home page, click on the **VACCINE MARKETPLACE**



Home

Recipient

Appointments

Locations

Bulk Registration

Vaccine Inventory

Vaccine Marketplace

Shipments

More

You are currently logged in as RPA Loc 1

Switch Locations

Recipient Check-In

You can check in a recipient by entering their appointment confirmation number into the box below

Appointment Confirmation Number

Go

No Appointment Confirmation Number?

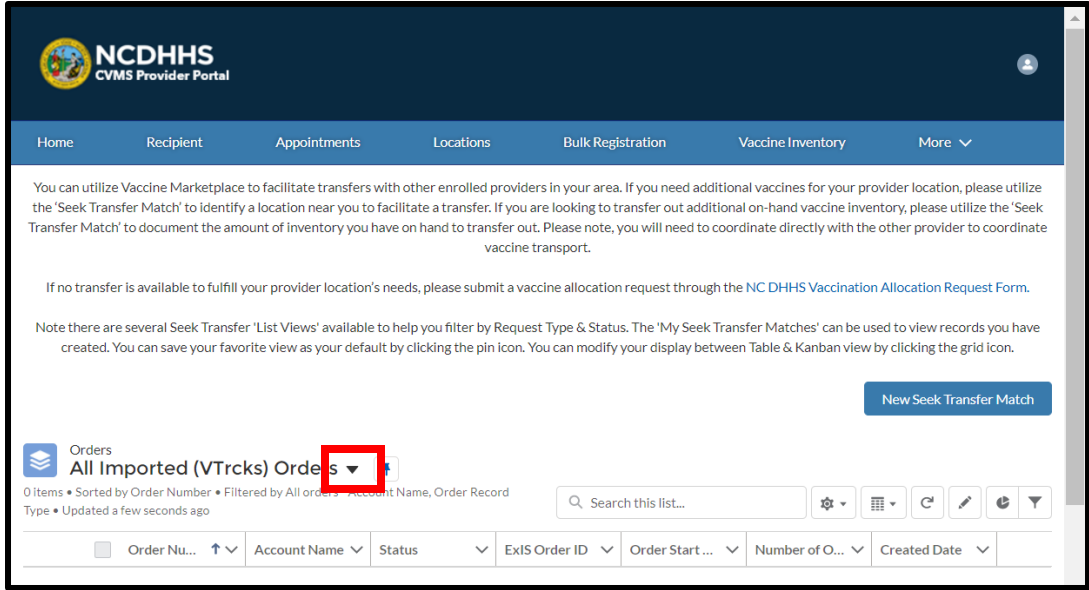
Search Appointments

Today's Appointments

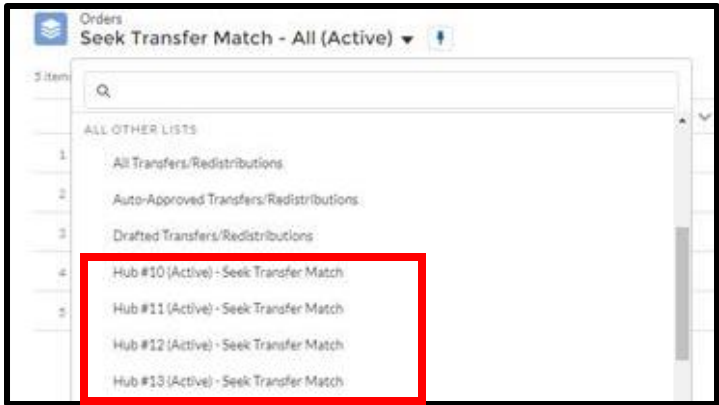
TIME	DETAILS	CASE NUMBER	LOCATION
------	---------	-------------	----------

Step 2 of 16: View All Available And Active Listings Posted By Your Assigned Hub

1. Locate Listings and click on the drop-down menu to change the view




2. Select **HUB#? (ACTIVE) - SEEK TRANSFER MATCH** of your assigned HUB



Audience

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Location Manager

Tips

To always see the available and active requests posted by your assigned HUB, set the view to the correct **HUB#? (ACTIVE) - SEEK TRANSFER MATCH** and use the pin icon  to set this as your default view.

Step 3 of 16: Check if your Assigned Hub is Offering the Vaccine you Seek

After sorting your results, navigate the list to find the inventory that appears to best suit your need.

- 1. Check the Brands, quantities available, Transport solution proposed by the Hub Location

Audience

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You can utilize Vaccine Marketplace to facilitate transfers with other enrolled providers in your area. If you need additional vaccines for your provider location, please utilize the 'Seek Transfer Match' to identify a location near you to facilitate a transfer. If you are looking to transfer out additional on-hand vaccine inventory, please utilize the 'Seek Transfer Match' to document the amount of inventory you have on hand to transfer out. Please note, you will need to coordinate directly with the other provider to coordinate vaccine transport.

If no transfer is available to fulfill your provider location's needs, please submit a vaccine allocation request through the [NC DHHS Vaccination Allocation Request Form](#).

Note there are several Seek Transfer 'List Views' available to help you filter by Request Type & Status. The 'My Seek Transfer Matches' can be used to view records you have created. You can save your favorite view as your default by clicking the pin icon. You can modify your display between Table & Kanban view by clicking the grid icon.

New Seek Transfer Match

Orders

Hub #1 (Active) - Seek Transfer Match

4 items • Sorted by Auto-Update Available Doses? (All) • Filtered by All orders - 4 more filters applied • Updated a few seconds ago

Search this list...

	Order N...	Request...	Account Name	Product	Brand	Dos...	Expirati...	HCP Co...	HCP Co...	HCP Contact E...	Transport: P...
1	<input type="checkbox"/> ORD-0...	Extra (t...	DoNotUse - NotRealLoc...	Pfizer...		1,995	7/8/2021	Nicole ...	800-82...	uattestsf00+hc...	Delivery Only
2	<input type="checkbox"/> ORD-0...	Extra (t...	DoNotUse - QALoc1	TestV...	moderna	994	9/16/2...	fsdfsdfds	703-79...	test@example.c...	Pickup Only
3	<input type="checkbox"/> ORD-0...	Extra (t...	DoNotUse - QALoc1	Mode...	moderna	20	6/15/2...	Seek Ex...	111-11...	ankit.o.srivastav...	Pickup Only
4	<input type="checkbox"/> ORD-0...	Extra (t...	DoNotUse - QALoc1	Mode...	moderna	20	6/15/2...	Seek Ex...	111-11...	ankit.o.srivastav...	Pickup Only

NC DEPARTMENT OF
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Step 4 of 16: Sort Inventories by Location

If your Hub offers do not match your need, check listings posted by other providers near your location.

- 1. Filter the Vaccine Marketplace on **SEEK TRANSFER MATCH – EXTRA (Active)**
- 2. Click on the Header Row fields **CITY** or **COUNTY** to sort the records in ascending or descending order by location

Audience

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Vaccine Inventory

Vaccine Marketplace

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You can utilize Vaccine Marketplace to facilitate transfers with other enrolled providers in your area. If you need additional vaccines for your provider location, please utilize the 'Seek Transfer Match' to identify a location near you to facilitate a transfer. If you are looking to transfer out additional on-hand vaccine inventory, please utilize the 'Seek Transfer Match' to document the amount of inventory you have on hand to transfer out. Please note, you will need to coordinate directly with the other provider to coordinate vaccine transport.

If no transfer is available to fulfill your provider location's needs, please submit a vaccine allocation request through the [NC DHHS Vaccination Allocation Request Form](#).

Note there are several Seek Transfer 'List Views' available to help you filter by Request Type & Status. The 'My Seek Transfer Matches' can be used to view records you have created. You can save your favorite view as your default by clicking the pin icon. You can modify your display between Table & Kanban view by clicking the grid icon.

New Seek Transfer Match

Orders

Seek Transfer Match - Extra (Active)

3 items • Sorted by City • Filtered by All orders - Status, Request Type, Order Record Type • Updated a few seconds ago

Order Number

Account Name

Cou...

City

Product

Brand

Dos...

Expiration D...

Created Date

Last Modified D...

Status

Request Type

1

ORD-0017342

Training Team V...

Wake

Raleigh

Pfizer-BioNTech...

300

1/1/2022

6/9/2021, 10:59...

6/9/2021, 10:59...

Acti...

Extra (to Send O...

2

ORD-0017260

DoNotUse - QA...

Moderna (14 do...

10

12/31/2021


6/2/2021, 9:46 ...

6/2/2021, 9:46 ...

Acti...

Extra (to Send O...

Step 5 of 16: Select the Request that Matches Your Need



Home

Recipient

Appointments

Locations

Bulk Registration


Vaccine Inventory

You can utilize Vaccine Marketplace to facilitate transfers with other enrolled providers in your area. If you need additional vaccines for your provider location, please utilize the 'Seek Transfer Match' to document the amount of inventory you need and request a transfer from another provider to coordinate vaccine transport.




If no transfer is available to fulfill your provider location's needs, please submit a vaccine allocation request.

Note there are several Seek Transfer 'List Views' available to help you filter by Request Type & Status. The 'My Seek Transfer Matches' can be used to view all matches. You can modify your display between Table & Kanban view by clicking the icon in the top right corner.

Orders

Seek Transfer Match - Extra (Active) 

3 items • Sorted by City • Filtered by All orders - Status, Request Type, Order Record Type • Updated a few seconds ago

	<input type="checkbox"/> Order Number	Account Name	Cou...	City	Product	Brand	Dos...	Exp...
1	<div><input type="checkbox"/> ORD-0017342</div>	Training Team V...	Wake	Raleigh	Pfizer-BioNTech...		300	1/1/...
2	<div><input type="checkbox"/> ORD-0017260</div>	DoNotUse - QA...			Moderna (14 do...		10	12/3...
3	<div><input type="checkbox"/> ORD-0017257</div>	DoNotUse - QA...			Moderna (14 do...		10	12/3...

After sorting your results, navigate the list to find the inventory that appears to best suit your need.

1. Click on the **ORDER NUMBER** associated with the request

Audience


Healthcare
Location Manager

Step 6 of 16: Review the Listing

Review the listing to see if it matches what you are looking for.

Audience

Healthcare Location Manager



NCDHHS

CYMS Provider Portal

Home

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Appointments

Location

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Vaccine Inventory

More

Order

ORD-0019719

Create Inquiry

Edit

Clone

Account Name

DoNotUse - NotRealLoc Hothfx 2

Status

Active

Product

Janssen COVID-19 Vaccine (Johnson & Johnson)

Doses Available for Transfer

300

DETAILS

RELATED

COVID-19 Vaccine Seek Transfer Match Instructions

Seek Transfer Match Instructions

Please note, this is a request to seek a transfer match with other provider locations. Use this form to indicate if you have extra vaccine available for transfer to other provider locations OR if you need additional vaccine at your location. This is NOT a request for State allocation and is intended to aid in communication and coordination between provider locations. Please see the steps below that outline how to use the Vaccine Marketplace:

- Fill out this form to request additional inventory as transfer or to transfer out inventory from your provider location.
- Monitor the Vaccine Marketplace to identify a match for your need.
- Once a match is identified, work directly with the provider to coordinate transport. Vaccine cannot be transported until the transfer in CYMS is approved.
- The provider location transferring out vaccine doses will initiate a transfer in CYMS. Please see this user guide with exact instructions: <https://covid19.ncdhhs.gov/media/2318/download/attachment>
- The State will review and approve the transfer request if it meets all requirements.

Doses per Vial Reminder

All inbound and outbound requests must be made in increments of doses available in full and unopened vials: 6 doses per vial for Pfizer, 10 doses per vial for Moderna, 5 doses per vial for Janssen (J&J).

Doses Available for Transfer Instruction

The 'Doses Available for Transfer' can be updated automatically or maintained manually. It is your preference & choice.

A) To have system automatically update, ensure 'Auto-Update Available Doses' (AIU) is checked. The system will then utilize field 'Doses Available (Cumulative)' which is the sum of Available Doses across all Associated Vaccine Inventories. E.g. 'Associated Vaccine Inventory' has 100 Doses Available & 'Associated Vaccine Inventory 2' has 200 Doses Available. The system will show 300 Doses Available for Transfer.

B) To manually maintain, ensure 'Auto-Update Available Doses' (AIU) is NOT checked. You will need to enter & keep up-to-date the 'Doses (Number)' field.

You can change between auto-update & manually maintain at any time. Note that auto-update assumes all Available Doses on all Associated Vaccine Inventories are Available for Transfer. If only a subset of doses are Available for Transfer, you will need to maintain manually.

Vaccine Seek Transfer Match Details

Extra (To Send Outbound)

Account Name

DoNotUse - NotRealLoc Hothfx 2

Doses (Number)

300

County

Wake

City

cary

Additional Comments (Optional)

Hub

Yes (Hub 1)

Coverage Type? (Hub)

Other (see Notes)

Order Start Date

7/13/2021

Status

Active

Status Indicator

HCP Contact Name

Grace

HCP Contact Phone

555-555-5555

HCP Contact Email

gracewat1match2@gmail.com

Primary Hub Associated to this Location

Transport: Pickup, Deliver, or Both

Pickup Only

Inactivation Reason

Additional Details If Extra (To Send Outbound)

Associated Vaccine Inventory

Grace Janssen for Marketplace

Vaccine Product to Transfer

Janssen COVID-19 Vaccine (Johnson & Johnson)

Expiration Date

7/21/2021

Lot Transferred

550055

Auto-Update Available Doses? (AIU)

☐

Doses Available (Cumulative)

400

Doses Per Vial (Number)

5

Sending Location Parent Account (Org)


DoNotUse - NotRealOrg Hothfx 1

Additional Details If Wanted (To Receive Inbound)

Step 7 of 16: Contact the Listing Author


If this listing is offering what you are looking for, you can contact them within the tool. The author of the listing will receive your message by email:

1. From the listing, navigate to the top of the page and click **CREATE INQUIRY**



NCDHHS
 CVMS Provider Portal

Home
 Recipient
 Appointments
 Location
 Bulk Registration
 Vaccine Inventory
 More



Order
ORD-0019719

Create Inquiry

Edit

Clone

Account Name
 DoNotUse - NotRealLoc Hothfx 2

Status
 Active

Product
 Janssen COVID-19 Vaccine (Johnson & Johnson)

Doses Available for Transfer
 300

DETAILS

RELATED

COVID-19 Vaccine Seek Transfer Match Instructions

Seek Transfer Match Instructions
 Please note, this is a request to seek a transfer match with other provider locations. Use this form to indicate if you have extra vaccine available for transfer to other provider locations OR if you need additional vaccine at your location. This is NOT a request for State allocation and is intended to aid in communication and coordination between provider locations. Please see the steps below that outline how to use the Vaccine Marketplace:
 1. Fill out this form to request additional inventory as transfer or to transfer out inventory from your provider location.
 2. Monitor the Vaccine Marketplace to identify a 'match' for your need.
 3. Once a match is identified, work directly with the provider to coordinate transport. Vaccine cannot be transported until the transfer in CVMS is approved.
 4. The provider location transferring out vaccine doses will initiate a transfer in CVMS. Please see this user guide with exact instructions: <https://govd19.ncdhhs.gov/media/2318/download?attachment>
 5. The State will review and approve the transfer request if it meets all requirements.
 Doses per Vial Reminder
 All inbound and outbound requests must be made in increments of doses available in full and unopened vials: 6 doses per vial for Pfizer, 10 doses per vial for Moderna, 5 doses per vial for Janssen (J&J).
 Doses Available for Transfer Instruction
 The 'Doses Available for Transfer' can be updated automatically or maintained manually. It is your preference & choice.
 A) To have system automatically update, ensure 'Auto-Update Available Doses?' (All) is checked. The system will then utilize field 'Doses Available (Cumulative)' which is the sum of Available Doses across all Associated Vaccine Inventories. E.g. 'Associated Vaccine Inventory' has 100 Doses Available & 'Associated Vaccine Inventory 2' has 200 Doses Available. The system will then show 300 Doses Available for Transfer.
 B) To manually maintain, ensure 'Auto-Update Available Doses?' (All) is NOT checked. You will need to enter & keep up-to-date the 'Doses (Number)' field.
 You can change between auto-update & manually maintain at any time. Note that auto-update assumes all Available Doses on all Associated Vaccine Inventories are Available for Transfer. If only a subset of doses are Available for Transfer, you will need to maintain manually.

Vaccine Seek Transfer Match Details


Request Type
 Extra (To Send Outbound)

Order Start Date
 7/13/2021

Account Name
 DoNotUse - NotRealLoc Hothfx 2

Status
 Active

Doses (Number)
 300

Status Indicator


County
 Wake

HCP Contact Name
 Grace

City
 Cary

HCP Contact Phone
 555-555-5555

Additional Comments (Optional)

HCP Contact Email
 gracewatt1match2@gmail.com

Hub 1
 Yes (Hub 1)

Primary Hub Associated to this Location 1

Coverage Type? (Hub 1)
 Other (See Notes)

Transport: Pickup, Deliver, or Both 1
 Pickup Only
 Inactivation Reason 1

Additional Details If Extra (To Send Outbound)

Associated Vaccine Inventory
[Grace Janssen for Marketplace](#)

Auto-Update Available Doses? (All) 1
☐

Vaccine Product to Transfer
 Janssen COVID-19 Vaccine (Johnson & Johnson)

Doses Available (Cumulative) 1
 400

Expiration Date
 7/21/2021

Doses Per Vial (Number)
 5

Lot Transferred
 550055

Sending Location Parent Account (Org)
 DoNotUse - NotRealOrg Hothfx 1

Additional Details If Wanted (To Receive Inbound)

Manufacturer

Audience

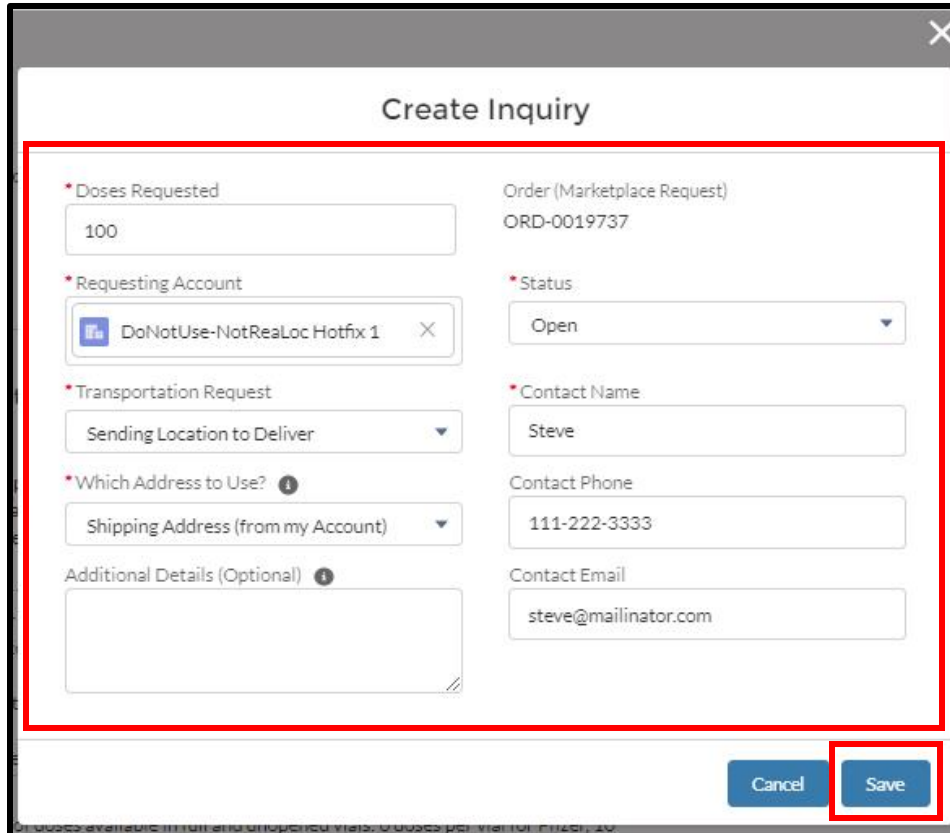
Healthcare Location Manager

Tips

It is possible to contact the HCP contact directly with the information provided on the seek transfer match.



Step 8 of 16: Complete the Inquiry



The screenshot shows a 'Create Inquiry' form with the following fields and values:

- Doses Requested:** 100
- Requesting Account:** DoNotUse-NotReaLoc Hotfix 1
- Transportation Request:** Sending Location to Deliver
- Which Address to Use?:** Shipping Address (from my Account)
- Additional Details (Optional):** (Empty text area)
- Order (Marketplace Request):** ORD-0019737
- Status:** Open
- Contact Name:** Steve
- Contact Phone:** 111-222-3333
- Contact Email:** steve@mailinator.com

At the bottom right, there are 'Cancel' and 'Save' buttons. The 'Save' button is highlighted with a red box.

1. Complete the following fields

- Doses requested
- Requesting Account
- Status (should be set to **OPEN**)
- Transportation Request
- Contact Name
- Address (can either select the address associated with the account or enter another address in the **ADDITIONAL DETAILS**)
- Contact phone (optional)
- Contact e-mail (optional)

2. Click **SAVE**

Audience

Healthcare
Location Manager

Tips

Use the **ADDITIONAL DETAILS** section to fully describe your needs.

Step 9 of 16: Review the Inquiry

Review your inquiry. Pay special attention to the **TRANSFER WARNING?** box. If checked, CVMS has determined that the inquiry is going to a provider not associated with the same hub as you. This only serves as a visual warning and will not prevent the inquiry or potential transfer for taking place. If any changes are needed, the inquiry can be edited by clicking **EDIT** in the upper right-hand corner.

Audience

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HomeRecipientAppointmentsLocationsBulk RegistrationVaccine InventoryVaccine MarketplaceShipmentsMore

Marketplace Inquiry
MKTINQ-0082

EditCloneNew Note

DETAILSRELATED

Information

Marketplace Inquiry Name
MKTINQ-0082

Doses Requested
100

Requesting Account
DoNotUse-NotRealLoc Hotfix 1

Transportation Request
Sending Location to Deliver

Which Address to Use?
Shipping Address (from my Account)

Address
Road
Vlk, North Carolina 00000
County: Unknown
Additional Details (Optional)

Order (Marketplace Request)
ORD-0019737

Status
Open

Contact Name
Steve

Contact Phone
111-222-3333

Contact Email
steve@mailinator.com

Transfer Warning?
☒

Warning Details (System Detected)
Mismatched Hubs (i.e. Account which created this Inquiry is assigned a different Hub than the Account which created the Seek Transfer Match request)

Additional Details (copied from Order/Marketplace Request)

Requested from Account
SP_Loc1

Transport Reqs of Listing Account
Pickup Only


Vaccine Product
Moderna (14 doses/vial) COVID-19 Vaccine

System Information

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Once the transferred inventory is delivered, add the inventory in the CVMS Provider Portal by **receiving an Inbound Transfer** ([Click here to read the instructions on the Inbound Transfer Process located in this user guide](#)).



NCDHHS
 CVMs Provider Portal

Home

Recipient


Appointments

Location

Bulk Registration

Vaccine Inventory

More ▾



Order

ORD-0019719

Create Inquiry

Edit

Clone

Account Name	Status	Product	Doses Available for Transfer
DoNotUse - NotRealLoc Hoths 2	Active	Janssen COVID-19 Vaccine (Johnson & Johnson)	300

DETAILS

RELATED

COVID-19 Vaccine Seek Transfer Match Instructions

Seek Transfer Match Instructions

Please note, this is a request to seek a transfer match with other provider locations. Use this form to indicate if you have extra vaccine available for transfer to other provider locations OR if you need additional vaccine at your location. This is NOT a request for State allocation and is intended to aid in communication and coordination between provider locations. Please see the steps below that outline how to use the Vaccine Marketplace:

- Fill out this form to request additional inventory as transfer or to transfer out inventory from your provider location.
- Monitor the Vaccine Marketplace to identify a match for your need.
- Once a match is identified, work directly with the provider to coordinate transport. Vaccine cannot be transported until the transfer in CVMs is approved.
- The provider location transferring out vaccine doses will initiate a transfer in CVMs. Please see this user guide with exact instructions: <https://covid19.ncdhhs.gov/media/2318/download/attachment>
- The State will review and approve the transfer request if it meets all requirements.

Doses per Vial Reminder

All inbound and outbound requests must be made in increments of doses available in full and unopened vials: 6 doses per vial for Pfizer, 10 doses per vial for Moderna, 5 doses per vial for Janssen (J&J).

Doses Available for Transfer Instruction

The 'Doses Available for Transfer' can be updated automatically or maintained manually. It is your preference & choice.

A) To have system automatically update, ensure 'Auto-Update Available Doses' (AIU) is checked. The system will then utilize field 'Doses Available (Cumulative)' which is the sum of Available Doses across all Associated Vaccine Inventories. E.g. 'Associated Vaccine Inventory' has 100 Doses Available & 'Associated Vaccine Inventory 2' has 200 Doses Available. The system will show 300 Doses Available for Transfer.

B) To manually maintain, ensure 'Auto-Update Available Doses' (AIU) is NOT checked. You will need to enter & keep up-to-date the 'Doses (Number)' field.

You can change between auto-update & manually maintain at any time. Note that auto-update assumes all Available Doses on all Associated Vaccine Inventories are Available for Transfer. If only a subset of doses are Available for Transfer, you will need to maintain manually.

Vaccine Seek Transfer Match Details

Request Type

Extra (to Send Outbound)

Account Name

DoNotUse - NotRealLoc Hoths 2

Doses (Number)

300

County

Wake

City

cary

Additional Comments (Optional)

Hub 1

Yes (Hub 1)

Coverage Type? (Hub 1)

Other (see Notes)

Order Start Date

7/13/2021

Status

Active

Status Indicator

HCP Contact Name

Grace

HCP Contact Phone

555-555-5555

HCP Contact Email

gracewatt1match2@gmail.com

Primary Hub Associated to this Location

Transport: Pickup, Deliver, or Both

Pickup Only

Inactivation Reason

Additional Details If Extra (To Send Outbound)

Associated Vaccine Inventory

[Grace Janssen for Marketplace](#)

Vaccine Product to Transfer

Janssen COVID-19 Vaccine (Johnson & Johnson)

Expiration Date

7/21/2021

Lot Transferred

550055

Auto-Update Available Doses? (AIU)

☐

Doses Available (Cumulative)

400

Doses Per Vial (Number)

5

Sending Location (Parent Account [Org])

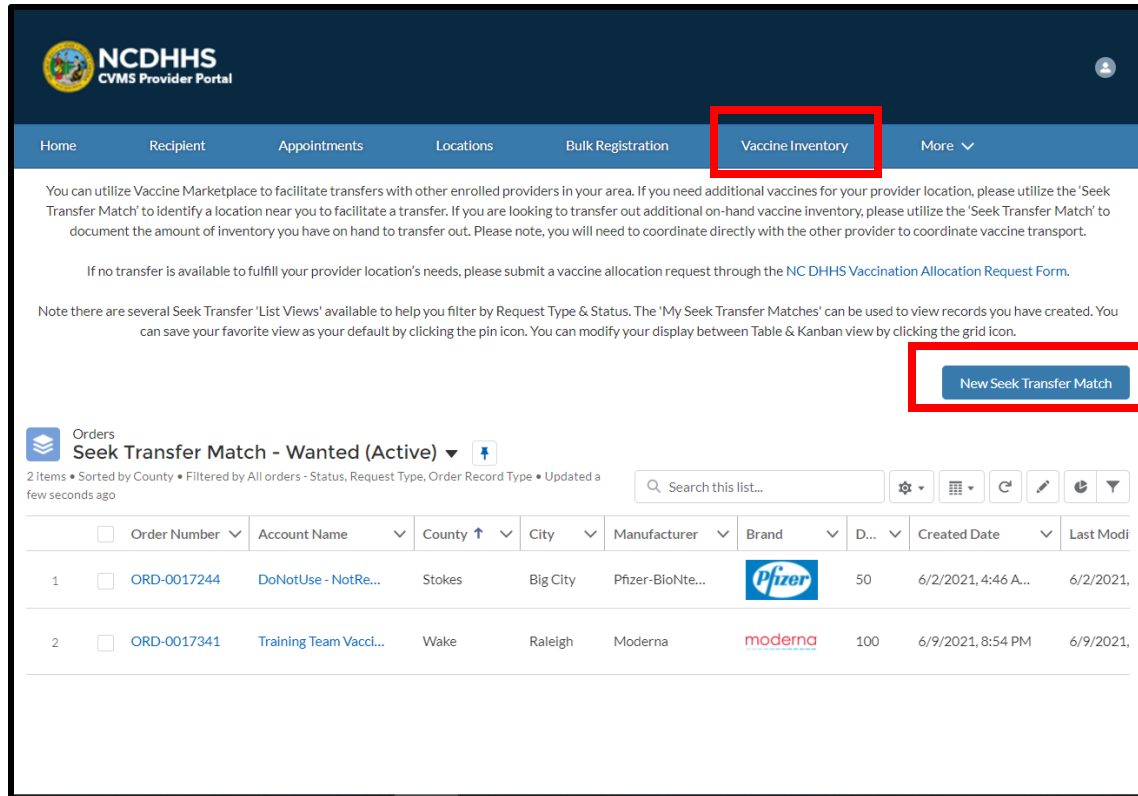
DoNotUse - NotRealOrg Hoths 1

Additional Details If Wanted (To Receive Inbound)



Manufacturer

Audience

Step 11 of 16: Initiate a New Seek Transfer Match



The screenshot shows the NCDHHS CVMS Provider Portal interface. The 'Vaccine Inventory' tab is highlighted in the top navigation bar. Below the navigation bar, there is a section titled 'You can utilize Vaccine Marketplace to facilitate transfers with other enrolled providers in your area...' followed by instructions on how to use the 'Seek Transfer Match' feature. A 'New Seek Transfer Match' button is highlighted with a red box. Below this, there is a section titled 'Orders' with a dropdown menu set to 'Seek Transfer Match - Wanted (Active)'. It shows 2 items, sorted by County, filtered by All orders - Status, Request Type, Order Record Type, and Updated a few seconds ago. The table below lists two items:

	<input type="checkbox"/>	Order Number	Account Name	County	City	Manufacturer	Brand	D...	Created Date	Last Modi
1	<input type="checkbox"/>	ORD-0017244	DoNotUse - NotRe...	Stokes	Big City	Pfizer-BioNte...		50	6/2/2021, 4:46 A...	6/2/2021,
2	<input type="checkbox"/>	ORD-0017341	Training Team Vacci...	Wake	Raleigh	Moderna		100	6/9/2021, 8:54 PM	6/9/2021,

If no provider is offering the type of COVID-19 vaccine product you are seeking, post a **WANTED** request in the Vaccine Marketplace to let other providers know that you can are seeking additional COVID-19 vaccine doses.

1. Navigate to the **VACCINE MARKETPLACE** tab
2. Click on **NEW SEEK TRANSFER MATCH**

Audience

Healthcare
Location Manager

Step 12 of 16: Start completing the “Seek Transfer Match” Form

New Order: Seek Transfer Match

COVID-19 Vaccine Seek Transfer Match Instructions

Seek Transfer Match Instructions

Please note, this is a request to seek a transfer match with other provider locations. Use this form to indicate if you have extra vaccine available for transfer to other provider locations OR if you need additional vaccine at your location. This is NOT a request for State allocation and is intended to aid in communication and coordination between provider locations. Please see the steps below that outline how to use the Vaccine Marketplace:

1. Fill out this form to request additional inventory as transfer or to transfer out inventory from your provider location.
2. Monitor the Vaccine Marketplace to identify a 'match' for your need.
3. Once a match is identified, work directly with the provider to coordinate transport. Vaccine cannot be transported until the transfer in CVMS is approved.
4. The provider location transferring out vaccine doses will initiate a transfer in CVMS. Please see this user guide with exact instructions: <https://covid19.ncdhhs.gov/media/2318/download?attachment>
5. The State will review and approve the transfer request if it meets all requirements.

Doses per Vial Reminder

All inbound and outbound requests must be made in increments of doses available in full and unopened vials: 6 doses per vial for Pfizer, 10 doses per vial for Moderna, 5 doses per vial for Janssen (J&J).

Seek Transfer Match Details

* Request Type

Wanted (to Receive Inbound)

* Order Start Date

6/9/2021

* Account Name

Training Team Vaccine Provider - Sit...

* Status

Active

* Doses (Number)

300

* HCP Contact Name

Ernest Celestine

Additional Comments (Optional)

* HCP Contact Phone

111-333-4444

1. Read the instructions at the top of window
2. Complete the required fields:
 - **Request Type:** select “Wanted (to Receive Inbound)”
 - **Order Start Date:** enter today’s date
 - **Account Name:** select your location account name
 - **Status:** select **ACTIVE**
 - **Doses:** enter the number of doses you are looking for
 - **HCP Contact Name/phone/email:** who to contact to agree on the transfer
 - **Additional Comments:** enter any information that could be useful like the address of shipment, and opening hours to receive the shipment

Audience

Healthcare
Location Manager

Step 13 of 16: Submit the “Seek Transfer Match” Form

New Order: Seek Transfer Match

Additional Details if Extra (To Send Outbound)

Associated Vaccine Inventory

Search Vaccine Inventories...

Additional Details if Wanted (To Receive Inbound)

Manufacturer

Janssen (J&J)

Requesting Provider to check box below to confirm adherence to each req...

Adherence to all Requirements



Requirement 1 (Seek Transfer Match)

Please confirm you have read and reviewed the latest CDC Shipping and Handling guidance for vaccine transport: <https://www.cdc.gov/vaccines/hcp/admin/storage/toolkit/storage-handling-toolkit.pdf>

Requirement 2 (Seek Transfer Match)

All transfer matches will be provider initiated and led. Providers will be responsible for documenting the transfer in CVMS and coordinating the physical transport of the vaccine. The State will not be available to support any physical transport of vaccine in a transfer match request made through the Vaccine Marketplace as DHHS is not monitoring this forum for requests for State support. Providers in need of vaccine who are unable to secure doses following the conditions outlined within the Vaccine Marketplace will need to submit a vaccine allocation request through the NC DHHS Vaccination Allocation Request Form.

System Information

Order Record Type

Seek Transfer Match

Order Owner

Simon Couderc

Cancel

Save & New

Save

1. Scroll down and complete the bottom of the form:

- **Manufacturer:** select the COVID-19 vaccine brand you are seeking, or select **ANY** if any brand is acceptable
- **Adherence to all Requirements:** read requirements 1 and 2 and select the checkbox to agree to them

2. Click **SAVE**

Audience

Healthcare
Location Manager

Tips

Your form will automatically change to an auto-lapsed status after 21 days. To extend, see the section named “[Maintain Your Requests Posted in the Vaccine Marketplace](#)”. The auto-lapse email will go to the email address associated to your NCID, not the email you enter in the form.

Step 14 of 16: Close Your Listing

DETAILS

RELATED

COVID-19 Vaccine Seek Transfer Match Instructions

Seek Transfer Match Instructions

Please note this is a request to seek a transfer match with other provider locations. Please use this form to indicate if you have extra vaccine available for transfer to other provider locations OR if you need additional vaccine at your location. This is NOT a request for State allocation and the State will not be regularly viewing these. It is intended to aid in communication between provider locations.

Doses per Vial Reminder

All inbound and outbound requests must be made in increments of doses available in full and unopened vials: 6 doses per vial for Pfizer, 10 doses per vial for Moderna, 5 doses per vial for Janssen (J&J).

Seek Transfer Match Details

* Request Type

Extra (to Send Outbound)

* Account Name

DoNotUse - QALoc1

* Doses (Number)

10

County

City

* Order Start Date

5/24/2021

* Status

Active

--None--

Active

Closed/Inactive

Auto-Lapsed (Old)

Incomplete

111-111-1111

If you reach agreement with a provider on the conditions of transfer, the sending provider will enter a transfer in the CVMS Provider Portal. Once the inventory is delivered, you can **receive the Inbound Transfer to add the inventory to your location** ([Click here for instructions on the Transfer](#)).

When the transfer has been agreed on, close your post in the Marketplace:


1. Navigate to the **Vaccine Marketplace** tab
2. Filter the view on

Orders

My Seek Transfer Matches
3. Open the form
4. Click on **EDIT** at the top right
5. Change the Status to **CLOSED/INACTIVE**

Audience

Healthcare
Location Manager



NC DEPARTMENT OF
HEALTH AND
HUMAN SERVICES

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Step 15 of 16: Set Inactivation Reason

▼ Seek Transfer Match Details

* Request Type
Wanted (to Receive Inbound)

* Order Start Date
7/1/2021

* Account Name
DoNotUse-NotRealOrg Hotfix 1

* Status
Closed/Inactive

Doses (Number)
1,000

County
Unknown

City
Vik

Additional Comments (Optional)

Hub? 1
Yes(Hub 1)

Coverage Type? (Hub) 1
Regional

Primary Hub Associated to this Location? 1

Transport: Pickup, Deliver, or Both? 1
Pickup Only

Inactivation Reason 1
--None--
Completed (single Transfer)
Completed (multiple Transfers)
Fulfilled w/o using Marketplace
Unfulfilled or No longer applicable
Created in Error
Auto-Lapsed (Weeks w/o Modification)
Auto-Lapsed (Expiration Date past)

▼ Additional Details if Extra (To Send Outbound)

Associated Vaccine Inventory
Search Vaccine Inventories...

Vaccine Product to Transfer
Moderna (14 doses/vial) COVID-19 Vaccine

Expiration Date
8/31/2021

Lot Transferred
19128

▼ Additional Details if Wanted (To Receive)

Cancel Save

When the seek transfer match is closed, identify the reason. Navigate to the **Vaccine Marketplace** tab

1. Navigate to the **INACTIVATION REASON**
2. Open the pick list
3. Select the appropriate reason
4. Click **SAVE**

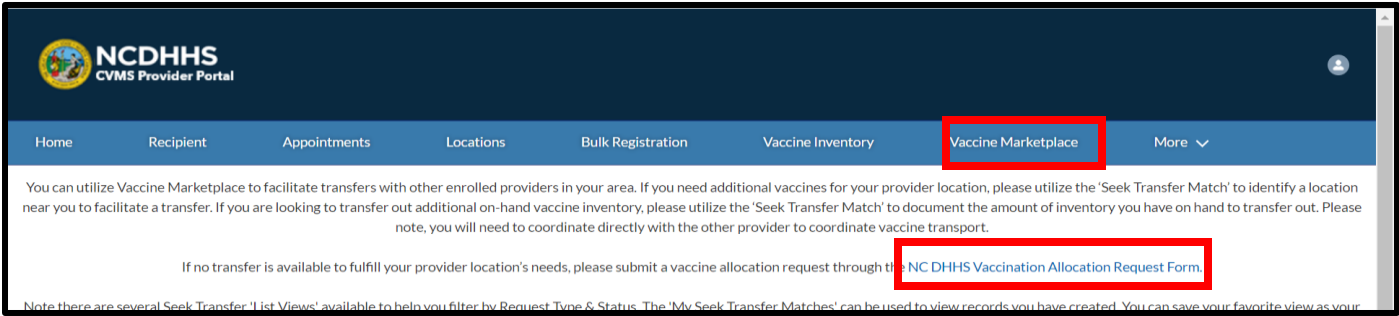
Audience

Healthcare
Location Manager

Step 16 of 16: Request a New Shipment to the NCDHHS Team

If there is no inventory available nearby, you can submit a request to the State via the NCDHHS Vaccine Allocation Form: <https://surveymax.dhhs.state.nc.us/TakeSurvey.aspx?SurveyID=98MI76m3#>. A link to the form was added to the **VACCINE MARKETPLACE** tab.

1. Navigate to **VACCINE MARKETPLACE**
2. Click the **NC DHHS VACCINATION ALLOCATION REQUEST FORM** link



3. Fill out the form and submit it

Allocation Request Form Page 1 of 3

Provider Information
Please enter your provider organization and location information below.

1. Parent Organization*
2. Please choose your provider location name*
Select one from below list:
[PIN - Provider Location Name]
3. If your "PIN - Provider Location Name" is not in the dropdown above, please enter it here:
4. Provider Contact Name*
5. Provider Contact Email*
6. Provider Contact Phone Number*

Next

Allocation Request Form Page 2 of 3

Allocation Request
Please request vaccine doses below (inclusive of first and second doses).

7. Please request the number of Pfizer doses your provider location would like below (inclusive of first and second doses). Put '0' if you do not want any Pfizer doses. Pfizer doses requested must be in multiples of 1170.*
[0]
8. Please request the number of Moderna doses your provider location would like below (inclusive of first and second doses). Put '0' if you do not want any Moderna doses. Moderna doses requested must be in multiples of 100.*
[0]
9. Please request the number of Janssen doses your provider location would like below (inclusive of first and second doses). Put '0' if you do not want any Janssen doses. Janssen doses requested must be in multiples of 100.*
[0]
10. Your requested doses will likely be filled via transfer facilitated through this request form. Please provide the name of the on-site coordinator to assist with the transfer.*
11. Your requested doses will likely be filled via transfer facilitated through this request form. Please provide the phone number of the on-site coordinator to assist with the transfer.*

Back **Next**

Allocation Request Form Page 3 of 3

Recorded Doses and Attestation

12. Please estimate the number of administered vaccinations that have not yet been recorded in CVMS.*
[0]
13. By clicking this box, I affirm that I have reviewed the list of providers in my area with on-hand inventory and that these providers do not have inventory that cover my need.*
☒ Yes
14. By clicking this box, I understand that we must have vaccine administrations recorded into the COVID-19 Vaccine Management System (CVMS) within 72 hours of administration. On behalf of the Parent Organization, I certify that we will act in good faith and to the best of our abilities to comply with all expectations.*
☒ Yes

Back **Done** **Enter Next Response**

Maintain Your Requests Posted in the Vaccine Marketplace

Step 1 of 3: Renew Your Extra or Wanted Listings

The screenshot shows the NCDHHS CVMS Provider Portal. The 'Vaccine Marketplace' tab is highlighted in the top navigation bar. Below the navigation bar, there is a section titled 'My Seek Transfer Matches' with a search bar and a table of 5 items. The table has columns for Order Number, Request Type, Status, and various location and inventory details. The first row, with Order Number ORD-0017311, is highlighted with a red box. The status of this row is 'Auto-Lapsed (Old)' with a yellow status indicator.

	Order Number	Request Type	Status	St...	Acc...	Co...	City	Pr...	Brand	D...	Cre...	Las...
1	ORD-0017311	Extra (to Se...	Auto-Lapsed (Old)	Yellow	Tra...	Wa...	Ral...	P...	Glaxo	30	6/7...	6/7...
2	ORD-0017314	Wanted (to ...	Auto-Lapsed (Old)	Yellow	Tra...	Wa...	Ral...	P...	Glaxo	30	6/7...	6/7...
3	ORD-0017341	Wanted (to ...	Closed/Inactive	Red	Tra...	Wa...	Ral...	M...	moderna	100	6/9...	6/9...
4	ORD-0017342	Extra (to Se...	Active	Green	Tra...	Wa...	Ral...	P...	Glaxo	300	6/9...	6/9...
5	ORD-0017343	Wanted (to ...	Active	Green	Tra...	Wa...	Ral...	Ja...	janssen	300	6/9...	6/9...

Your post in the Vaccine Marketplace will expire:

- after 21 days,
- once linked inventory expires,
- if the linked inventories was fully consumed (available dose = 0).

You can renew your post within 21 days from original posting, or after 21 days of original posting by cloning your form and posting a new one.

1. Navigate to the **VACCINE MARKETPLACE** tab
2. Change the view to **MY SEEK TRANSFER MATCHES**
3. Open the request you wish to extend or to clone

Audience

Healthcare
Location Manager

Tips

The Status color code is:
Yellow for Auto-lapse (Old) requests. These requests can only be cloned, and the Status cannot be modified.

Green for Active requests for which you can still extend the duration.

Red for Closed/Inactive requests that can be cloned as well to start a new form with the same content.

Step 2 of 3: Renew Your Listing

Home

Recipient

Appointments

Locations

Bulk Registration

More

Order

ORD-0017342

Edit

Clone

Account Name	Status	Manufacturer	Doses (Number)	Order Start Date
Training Team Vaccine Provider - Site 1	Active		300	6/9/2021

DETAILS

RELATED

COVID-19 Vaccine Seek Transfer Match Instructions

Seek Transfer Match Instructions

Please note, this is a request to seek a transfer match with other provider locations. Use this form to indicate if you have extra vaccine available for transfer to other provider locations OR if you need additional vaccine at your location. This is NOT a request for State allocation and is intended to aid in communication and coordination between provider locations. Please see the steps below that outline how to use the Vaccine Marketplace:

1. Fill out this form to request additional inventory as transfer or to transfer out inventory from your provider location.

2. Monitor the Vaccine Marketplace to identify a 'match' for your need.

3. Once a match is identified, work directly with the provider to coordinate transport. Vaccine cannot be transported until the transfer in CVMS is approved.

4. The provider location transferring out vaccine doses will initiate a transfer in CVMS. Please see this user guide with exact instructions: <https://covid19.ncdhhs.gov/media/2318/download?attachment>

5. The State will review and approve the transfer request if it meets all requirements.

Doses per Vial Reminder

All inbound and outbound requests must be made in increments of doses available in full and unopened vials: 6 doses per vial for Pfizer, 10 doses per vial for Moderna, 5 doses per vial for Janssen (J&J).

Seek Transfer Match Details

Request Type

Extra (to Send Outbound)

Account Name

Training Team Vaccine Provider - Site 1

Doses (Number)

Order Start Date

6/9/2021

Status

Active

Status Indicator

If you request is still active and you wish to extend the deadline before the request automatically expires, update the request date.

1. Click on **EDIT**

2. Update the **ORDER START DATE** to Today's date to reinitiate the 21-day countdown

3. Click **SAVE**

Audience

Healthcare Location Manager

Step 3 of 3: Clone Your Listing

Home

Recipient

Appointments

Locations

Bulk Registration

More

Order

ORD-0017314

Edit

Clone

Account Name

Status

Manufacturer

Doses (Number)

Training Team Vaccine Provider - Site 2

Auto-Lapsed (Old)

Pfizer-BioNtech

30

DETAILS

RELATED

COVID-19 Vaccine Seek Transfer Match Instructions

Seek Transfer Match Instructions

Please note this is a request to seek a transfer match with other provider locations. Please use this form to indicate if you have extra vaccine available for transfer to other provider locations OR if you need additional vaccine at your location. This is NOT a request for State allocation and the State will not be regularly viewing these. It is intended to aid in communication between provider locations.

Doses per Vial Reminder

All inbound and outbound requests must be made in increments of doses available in full and unopened vials: 6 doses per vial for Pfizer, 10 doses per vial for Moderna, 5 doses per vial for Janssen (J&J).

Seek Transfer Match Details

Request Type

Wanted (to Receive Inbound)

Order Start Date

6/7/2021

Account Name

Training Team Vaccine Provider - Site 2

Status

Auto-Lapsed (Old)

Doses (Number)

30

Status Indicator

County

Wake

HCP Contact Name

simon c

City

Raleigh

HCP Contact Phone

222-333-4444

If your request’s status is **AUTO-LAPSED (OLD)** or **CLOSED/INACTIVE** and you wish to post an identical new form, use the clone feature.

1. Click on **CLONE**
2. Update the **ORDER START DATE** to Today’s date to reinitiate the 21-day countdown
3. Update the Status to **ACTIVE**
4. Update any other fields if necessary
5. Click **SAVE**

Audience

Healthcare Location Manager

Transfer Vaccine between two Providers

Transfer Vaccine Inventories Between Two Locations

The screenshot shows the NCDHHS CVMS Provider Portal interface. At the top, there's a header with the NCDHHS logo and 'CVMS Provider Portal'. Below the header, a 'Vaccine Inventory' card displays 'Lot 123456 Exp 5/1/2022'. Action buttons include 'Request Transfer/Redistribution', 'Change Status', and 'Edit'. A modal titled 'Request Transfer/Redistribution' is open, containing instructions: 'Inventory Transfer/Redistribution. After reading these instructions click 'Cancel'. To submit a Transfer or Redistribution Request: 1) Click 'Related'; 2) Find the 'Orders' related list & click 'New'; 3) Complete the Transfer/Redistribution Request with 'Status=Submitted'. At the bottom of the modal are 'Cancel' and 'Save' buttons. The background shows a table with vaccine details: Lot 123456, Expiration Date 5/1/2022, 12:00 PM, Total Vials 100, and Account Training Team Vaccine Provider - Site 2.

Lot	Expiration Date	Total Vials	Account
123456	5/1/2022, 12:00 PM	100	Training Team Vaccine Provider - Site 2

When a COVID-19 vaccine is to be redistributed / transferred to another provider location

- Healthcare Location Manager enters the COVID-19 Vaccine Redistribution/Transfer Request into the CVMS Provider Portal with details such as Sending Location, Receiving Location, lot number, and quantity to redistribute/transfer. The approved redistribution/transfer is reflected as an order for the Receiving Location.
- The COVID-19 Vaccine On Hand inventory of the sending location is decreased. The receiving location has a COVID-19 Vaccine Inventory Record auto-created, but the quantity is noted as "in transit".
- Receiving Location completes "Inbound Redistribution/Transfer" process, and the quantity is changed from "in transit" to "available".

Initiate an Outbound Transfer or Redistribution

Overview of an Outbound Redistribution/Transfer

Redistribution and transfer requests require **NCDHHS IMMUNIZATION BRANCH APPROVAL** to ensure proper storage capabilities and tracking of COVID-19 Vaccine Inventory movements. There are three scenarios that transfer requests will fall under.

1. If a provider requests a redistribution between two CVMS Provider locations within the same organization, who have an existing redistribution agreement, **THE TRANSFER IS AUTOMATICALLY APPROVED BY NCDHHS IMMUNIZATION BRANCH**
2. If a provider requests a redistribution between two locations within the same organization, but there is no existing redistribution agreement, the **TRANSFER MUST BE MANUALLY APPROVED BY NCDHHS IMMUNIZATION BRANCH**
3. If a provider requests a transfer to a location that is outside their location's organization, the **TRANSFER MUST BE MANUALLY APPROVED BY NCDHHS IMMUNIZATION BRANCH**


Audience

Healthcare
Location Manager

Step 1 of 10: Locate Inventory for Redistribution/Transfer

To initiate an **OUTBOUND REDISTRIBUTION/TRANSFER** to another location, you will have to submit a request through the CVMS Provider Portal.

- 1. From the Home Page, click the **VACCINE INVENTORY** tab
- 2. Select the correct **VACCINE INVENTORY** Record that you want to redistribute/transfer to a different location / organization



Home

Recipient

Appointments

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Bulk Registration

Vaccine Inventory

Vaccine Marketplace

Shipments

More

Scan or type a barcode

Add

Waste

Insufficient Quantity

Inbound Transfer

Outbound Transfer

Vaccine Inventories

Recently Viewed

4 items • Updated a few seconds ago

Search this list...

Settings

Table

Refresh

Print

Filter

	Vaccine Inven...	Product Name	Lot	Total Doses	Doses Ava...	Expiration Da...	Date and Tim...	Usage (First o...	Account N..
1	Delivery 02/09/2...	Pfizer-BioNTech ...	123	0	0	2/1/2050, 12:00 ...	2/9/2021, 12:20 ...	First Dose only (...)	Clinic ABC L
2	Grace Pfizer Inve...	Pfizer-BioNTech ...	909	100	133	2/28/2021, 12:0...	1/12/2021, 11:3...		Clinic ABC L

Audience

Healthcare
Location Manager

Tips

Selecting the **OUTBOUND TRANSFER** button will not initiate a transfer request but will instead provide a brief overview of the instructions contained in this guide.

Step 2 of 10: Creating a Transfer/Redistribution Request

NCDHHS CVMS Provider Portal

Home Recipient Appointments Locations Bulk Registration Vaccine Inventory Vaccine Marketplace Shipments More ▾

Vaccine Inventory
Grace Pfizer Inventory

Request Transfer/Redistribution Change Status Edit

Account: [Clinic ABC Loc 1](#) Total Doses: 100 Extra Doses: 100 Doses Available: 133 Doses Administered: 49 Doses Wasted: 5

DETAILS **RELATED**

Orders (0) **New**

Appointments (6+)

Appointment	Contact Name	Status	Vaccine Status
00112886	3550retest1 user	Closed	Dose 1 Administered ▾
00112834	reji8 ayod8	Closed	Dose 1 Administered ▾
00112689	Grace Wix	Closed	Dose 2 Administered ▾
00112166	Tester Test	Closed	Dose 2 Administered ▾
00112165	Peggy Bundy	Closed	Dose 2 Administered ▾
00112161	Julius Rand	Closed	Dose 1 Administered ▾

[View All](#)

1. From the Vaccine Inventory Record, select the **RELATED** tab
2. Locate the **ORDERS** related list and click **NEW**

Audience

Healthcare
Location Manager

Tips

Selecting the **REQUEST TRANSFER / REDISTRIBUTION** button will not initiate a transfer request but will instead provide a brief overview of the instructions contained in this guide.

Step 3 of 10: Edit the Order Transfer Record

New Order: Transfer or Redistribution

Transfer Information

* Account Name

Clinic ABC Loc 1

Vaccine Receiver

Search Accounts...

* Dose Transferred

100

* Reason for Request

Redistribution - 1st dose

* Status

Submitted

Unable to find Vaccine Receiver

☒

* Vials Transferred

20

* Order Start Date

4/26/2021

Associated vaccine inventory

Grace Pfizer Inventory

Cancel Save & New Save

A pop-up window will appear titled **NEW ORDER: TRANSFER OR REDISTRIBUTION** for you to fill out.

1. Enter your own location for **ACCOUNT NAME**
2. Select **SUBMITTED** for status
3. If the receiving provider / location is in your organization, enter the name of the receiving provider in the **VACCINE RECEIVER** field
4. If the receiving provider / location is outside your organization, select the **UNABLE TO FIND VACCINE RECEIVER** button
5. Enter the desired number of doses to be transferred
6. Enter the desired number of vials to be transferred
7. Enter the reason for the request
8. Enter the desired date for transfer

Audience

Healthcare
Location Manager

Tips

The doses transferred must be less than the doses currently available on the selected Vaccine Inventory Record.

The Vials Transferred number must be equal to the Doses Transferred divided by the standard doses per vial for the vaccine inventory.

Save request as a Draft Status to review all information prior to submitting. Transfer request will be reviewed once the request status has been changed to submitted.

Step 4 of 10: Submit the Order Transfer Record

New Order: Transfer or Redistribution

Receiving COVID-19 Enrolled Provider Information

Receiving Location Name (CVMS)
Test Location

Receiving Location Street Address
123 Main Street

Receiving Location City
Raleigh

Receiving Location Phone
123-456-7890

Receiving Location Zip
12345

Receiving Location Primary Vaccine Coord
Vax Coordinator

Receiving Location Primary Coord Email
vax.j.coordinator@mailinator.com

Sending Provider to check box below to confirm adherence to each requirement:

☒ Adherence to all Requirements

Requirement 1:
Sending Provider and Receiving Provider location names listed above match exactly how they appear in the COVID-19 Vaccine Management System (CVMS) Provider Enrollment Portal.

Cancel Save & New **Save**

Scroll down within the **NEW ORDER: TRANSFER OR REDISTRIBUTION** pop-up window.

1. If the receiving provider / location is in your organization, do not enter any information in the **RECEIVING COVID-19 ENROLLED PROVIDER INFORMATION** section
2. If the receiving provider / location is outside your organization, fill in the Location Name, Street Address, City, Phone Number, Zip Code, and Vaccine Coordinator's Name and Phone Number for the receiving provider
3. Review all the listed requirements for initiating a transfer / redistribution request
4. Select the **ADHERENCE TO ALL REQUIREMENTS** checkbox
5. Click **SAVE**

Audience

Healthcare
Location Manager

Tips


You must fill in **ALL** fields in the **RECEIVING COVID-19 ENROLLED PROVIDER INFORMATION** section if you selected the **UNABLE TO FIND VACCINE RECEIVER** checkbox at the top of the form.

Step 5 of 10: Confirm the Redistribution/Transfer Request was Submitted

- 1. On the **ORDERS** related list from the Vaccine Inventory Related Tab, the new Order redistribution or transfer request will appear
- 2. If the status shows as **SUBMITTED** or **PROCESSING**, that indicates the redistribution or transfer is pending approval from NCDHHS Immunization Branch
- 3. If the status appears as **TRANSFER IN TRANSIT**, that indicates the transfer has been approved by NCDHHS Immunization Branch

Audience

Healthcare
Location Manager

 Vaccine Inventory
Grace Pfizer Inventory

Request Transfer/Redistribution


Change Status

Edit

Account	Total Doses	Extra Doses	Doses Available	Doses Administered	Doses Wasted
Clinic ABC Loc 1	100	100	133	49	5

DETAILS

RELATED

 Orders (1)

New

Order Number	Status	Vaccine Receiver	Dose Transferred
ORD-0000271	Submitted		100

View All

Step 6 of 10: Provide Redistribution/Transfer Details

Once your **NC COVID-19 VACCINE REDISTRIBUTION/TRANSFER REQUEST** is approved, you will be able to **SHIP YOUR VACCINE INVENTORY** to the receiving location.

As soon as the transfer is approved, the Healthcare Location Manager who initiated the transfer request will receive an automated email indicating the approval.

Audience

Healthcare
Location Manager




Step 7 of 10: Provide Redistribution/Transfer Details

You can **UPDATE** the Order Transfer Record with the **ACTUAL SHIPMENT DETAILS** to support tracking of the shipment. The Order Transfer Record can be located via the Vaccine Inventory Record that is providing the inventory.

- 1. From the Home page, click the **VACCINE INVENTORY** tab
- 2. Select the correct **VACCINE INVENTORY** Record

Audience

Healthcare
Location Manager



Home

Recipient

Appointments

Locations

Bulk Registration

Vaccine Inventory

Vaccine Marketplace

Shipments

More

Scan or type a barcode

Add

Waste

Insufficient Quantity

Inbound Transfer

Outbound Transfer

Vaccine Inventories

Recently Viewed

4 items • Updated a few seconds ago

Search this list...

Settings

Grid

Refresh

Filter

	Vaccine Inven... ▾	Product Name ▾	Lot ▾	Total Doses ▾	Doses Ava... ▾	Expiration Da... ▾	Date and Tim... ▾	Usage (First o... ▾	Account N..
1	Delivery 02/09/2...	Pfizer-BioNTech ...	123	0	0	2/1/2050, 12:00 ...	2/9/2021, 12:20 ...	First Dose only (...)	Clinic ABC I
2	Grace Pfizer Inve...	Pfizer-BioNTech ...	909	100	133	2/28/2021, 12:0...	1/12/2021, 11:3...		Clinic ABC I

Step 8 of 10: Open the Approved Redistribution/Transfer Request

- 1. Navigate to the **RELATED TAB**
- 2. Locate the Orders related list
- 3. Confirm that the Order is in **TRANSFER IN TRANSIT** status and click the **ORDER NUMBER** of the Transfer Request




Audience

Healthcare
Location Manager

Tips

Review the Vaccine Receiver to confirm it is the correct record.



NCDHHS
CVMS Provider Portal

Home

Recipient

Appointments

Locations

Bulk Registration

Vaccine Inventory

Vaccine Marketplace

Shipments

More

Vaccine Inventory

Grace Pfizer Inventory

Request Transfer/Redistribution

Change Status

Edit

Account	Total Doses	Extra Doses	Doses Available	Doses Administered	Doses Wasted
Clinic ABC Loc 1	100	100	33	49	5

DETAILS

RELATED

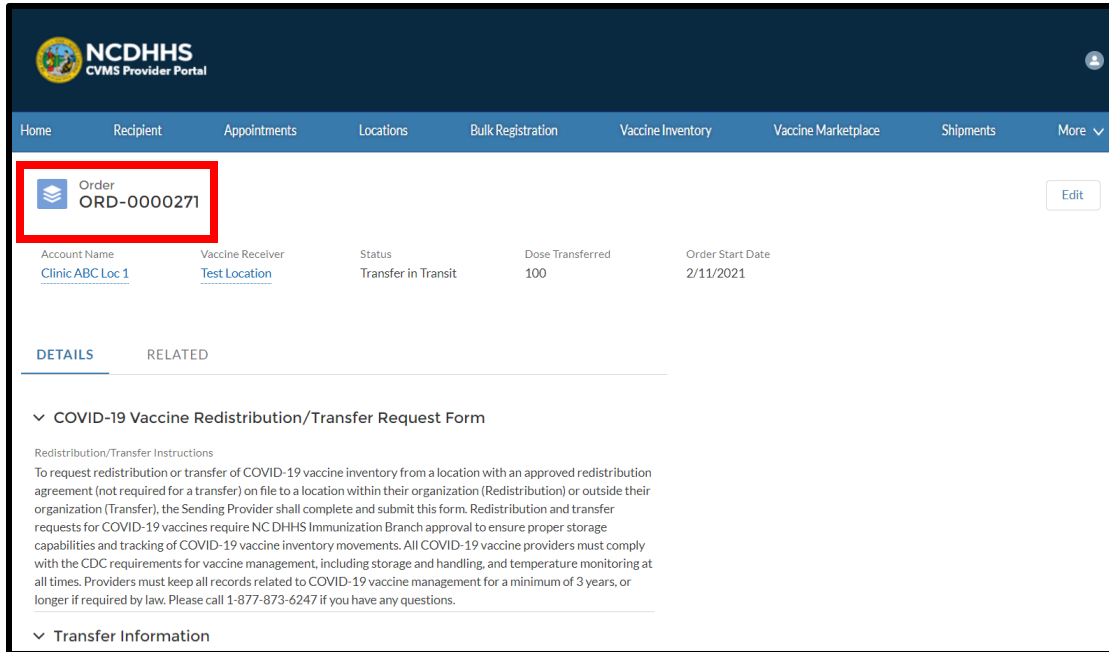
Orders (1)

New

Order Number	Status	Vaccine Receiver	Dose Transferred
ORD-0000271	Transfer in Transit	Test Location	100

View All

Step 9 of 10: Update the Order Transfer Record



NCDHHS CVMS Provider Portal

Home Recipient Appointments Locations Bulk Registration Vaccine Inventory Vaccine Marketplace Shipments More

Order
ORD-0000271 Edit

Account Name: [Clinic ABC Loc 1](#) Vaccine Receiver: [Test Location](#) Status: Transfer in Transit Dose Transferred: 100 Order Start Date: 2/11/2021

DETAILS RELATED

COVID-19 Vaccine Redistribution/Transfer Request Form

Redistribution/Transfer Instructions

To request redistribution or transfer of COVID-19 vaccine inventory from a location with an approved redistribution agreement (not required for a transfer) on file to a location within their organization (Redistribution) or outside their organization (Transfer), the Sending Provider shall complete and submit this form. Redistribution and transfer requests for COVID-19 vaccines require NC DHHS Immunization Branch approval to ensure proper storage capabilities and tracking of COVID-19 vaccine inventory movements. All COVID-19 vaccine providers must comply with the CDC requirements for vaccine management, including storage and handling, and temperature monitoring at all times. Providers must keep all records related to COVID-19 vaccine management for a minimum of 3 years, or longer if required by law. Please call 1-877-873-6247 if you have any questions.

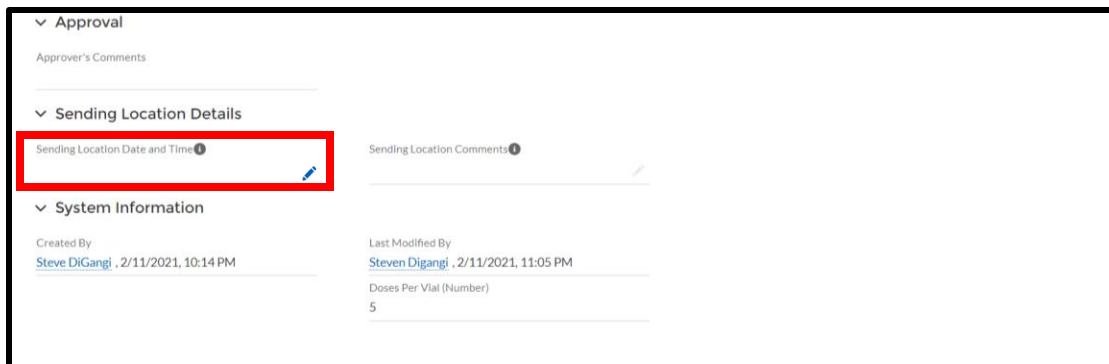
Transfer Information

Once you have the **ORDER TRANSFER RECORD** open, you can provide the **SHIPMENT DETAILS REQUIRED**.

1. Scroll down to the **SENDING LOCATION DETAILS** section
2. Click the **PENCIL ICON** next to **SENDING LOCATION DATE AND TIME**

Audience

Healthcare
Location Manager



Approval

Approver's Comments

Sending Location Details

Sending Location Date and Time 1 Pencil Icon

Sending Location Comments 1

System Information

Created By: [Steve DiGangi](#), 2/11/2021, 10:14 PM

Last Modified By: [Steven DiGangi](#), 2/11/2021, 11:05 PM

Doses Per Vial (Number): 5

Step 10 of 10: Submit Shipment Details

Once you click edit, you will be able to update the record and save your changes.

1. Enter the **SENDING LOCATION DATE** and **TIME** when shipment was sent
2. Enter the **SHIPMENT TRACKING INFORMATION** in the **SENDING LOCATION COMMENTS** field
3. Click **SAVE**

Audience

Healthcare
Location Manager

▼ Sending Location Details

Sending Location Date and Time ⓘ

Date

Time

Sending Location Comments ⓘ

▼ System Information

Created By

Steve DiGangi, 2/11/2021, 10:14 PM

Cancel

Save

Last Modified By

Steve DiGangi, 2/11/2021, 11:05 PM

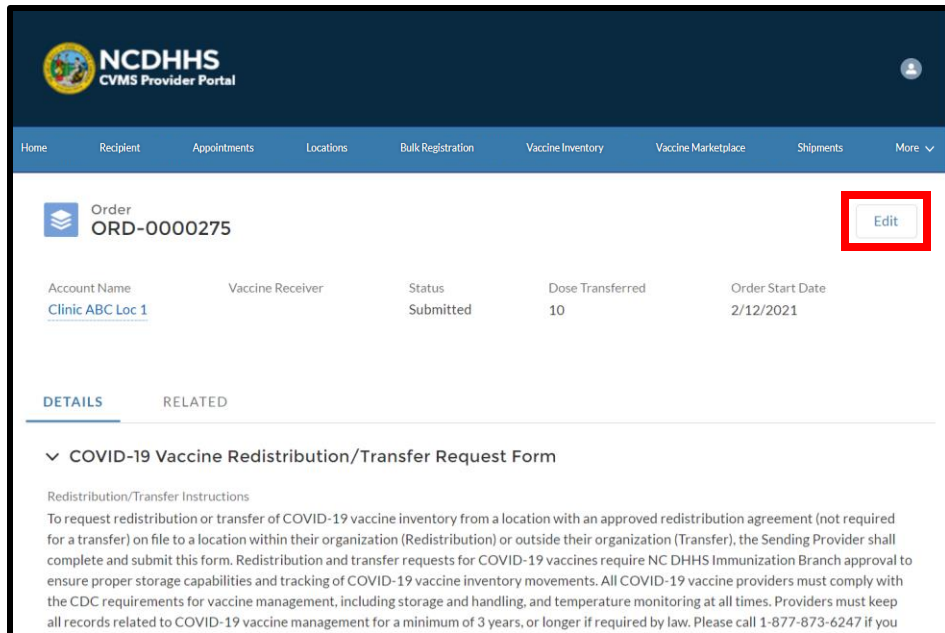
Editing Order Redistribution or Transfer Requests

Transfer requests can still be **EDITED** while in **SUBMITTED** or **DRAFT** status.

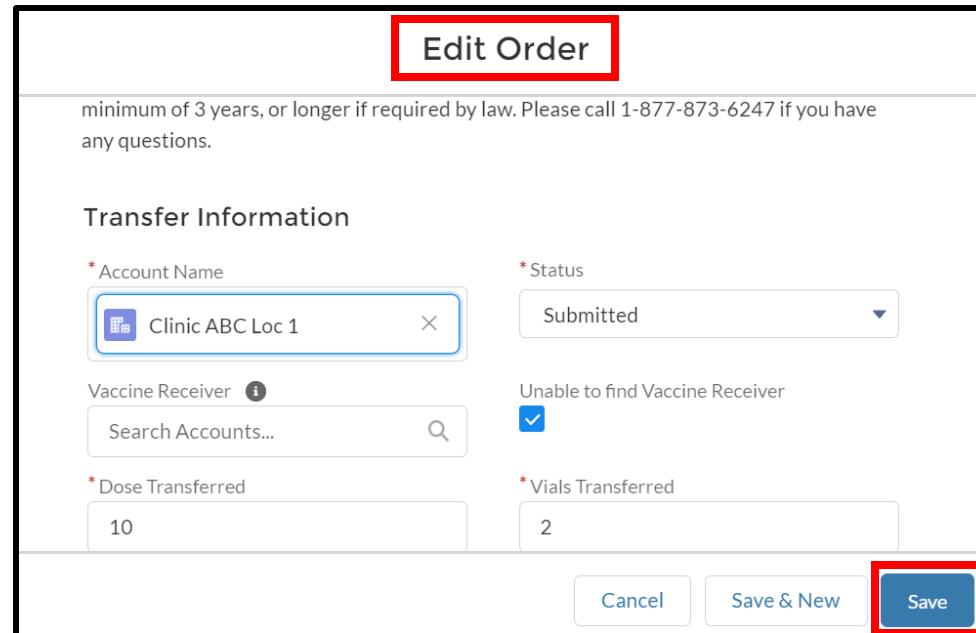
1. Select the Vaccine Inventory Record that has a transfer request
2. Navigate to the **RELATED** tab and select the Order Transfer Record that is still in **SUBMITTED** or **DRAFT** status
3. Click on the **EDIT** button
4. Make changes to the necessary fields and click **SAVE**

Audience

Healthcare
Location Manager



The screenshot shows the NCDHHS CVMS Provider Portal. The top navigation bar includes links for Home, Recipient, Appointments, Locations, Bulk Registration, Vaccine Inventory, Vaccine Marketplace, Shipments, and More. The main content area displays an order summary for ORD-0000275. The order details include Account Name (Clinic ABC Loc 1), Vaccine Receiver, Status (Submitted), Dose Transferred (10), and Order Start Date (2/12/2021). Below the order details, there are tabs for DETAILS and RELATED. The RELATED tab is selected, showing a section for COVID-19 Vaccine Redistribution/Transfer Request Form. The form includes instructions for redistribution and transfer requests. The 'Edit' button is highlighted with a red box.



The screenshot shows the 'Edit Order' form. The title 'Edit Order' is highlighted with a red box. The form contains the following fields:

- Account Name:** Clinic ABC Loc 1 (highlighted with a red box)
- Status:** Submitted (dropdown menu)
- Vaccine Receiver:** Search Accounts... (search bar)
- Dose Transferred:** 10
- Vials Transferred:** 2

At the bottom of the form, there are three buttons: Cancel, Save & New, and Save (highlighted with a red box).

Recalling Order Redistribution or Transfer Requests

The screenshot shows the NCDHHS CVMS Provider Portal interface. At the top, there's a navigation bar with links: Home, Recipient, Appointments, Locations, Bulk Registration, Vaccine Inventory, Vaccine Marketplace, Shipments, and More. Below this, the main content area displays an order summary for 'ORD-0000272'. The order is in 'Processing' status. A red box highlights the 'Edit' button next to the order ID. Another red box highlights the 'Account Name' (Crimson Skies - Location 3), 'Vaccine Receiver' (Crimson Skies - Location 1), and 'Status' (Processing). Below the order summary, there's a 'DETAILS' section with a 'RELATED' tab highlighted. Under the 'RELATED' tab, there's an 'Order History (5)' table showing a sequence of events from 2/11/2021, 10:44 PM, including 'Record locked', 'Created', 'Price Book', 'Submitted for Approval', and 'Status' changes. At the bottom, there's an 'Approval History (2)' table showing 'Review Transfer or Redistrib...' and 'Approval Request Submitted'. A red box highlights the 'Recall' button in the top right corner of the 'Approval History' section.

Date	Field	User	Original Value	New Value
2/11/2021, 10:44 PM	Record locked.	Nicholas TestCrimson		
2/11/2021, 10:44 PM	Created.	Nicholas TestCrimson		
2/11/2021, 10:44 PM	Price Book	Nicholas TestCrimson		Standard Price Book
2/11/2021, 10:44 PM	Submitted for Approval	Nicholas TestCrimson	<input type="checkbox"/>	<input checked="" type="checkbox"/>
2/11/2021, 10:44 PM	Status	Nicholas TestCrimson	Submitted	Processing

Step Name	Date	Status	Assigned To
Review Transfer or Redistrib...	2/11/2021, 10:44 PM	Pending	Transfer and Redistribution A...
Approval Request Submitted	2/11/2021, 10:44 PM	Submitted	Nicholas TestCrimson

Transfer requests can be **RECALLED** while in **PROCESSING** status. The recall function is only used when transferring between two locations in the same organization that do not have an existing redistribution agreement (Scenario #2 from the **Overview of an Outbound Redistribution/Transfer slide**). In any other scenario, the Healthcare Location Manager should use the **EDIT** capability.

1. Select the **VACCINE INVENTORY RECORD** that has a transfer request.
2. Navigate to the **RELATED** tab and select the Order Transfer Record that is still in **PROCESSING** status
3. Navigate to the **RELATED** tab on the Order Transfer Record
4. Scroll down to Approval History and click on **RECALL**
5. Add comments and click **RECALL**
6. **ORDER WAS RECALLED** will appear at the top of the screen

Audience

Healthcare
Location Manager

Receive Inbound Transfer or Redistribution

Step 1 of 4: Processing an Inbound Redistribution/Transfer

If you are **RECEIVING** an **INBOUND REDISTRIBUTION/TRANSFER** from another location, you will want to review the inbound transfer page to stay up-to-date. When you receive the inbound redistribution/transfer, you will be able to **PROCESS THE INVENTORY** via the **INBOUND TRANSFER PAGE**.

You **DO NOT** process inbound redistributions/transfers from the **ADD INVENTORY PROCESS**.

1. From the home page, click **VACCINE INVENTORY**
2. Click **INBOUND TRANSFER**

Audience

Healthcare
Location Manager

Tips

Inbound redistributions/transfers are **not** processed from the Add Inventory Process.

The screenshot shows the NCDHHS CVMS Provider Portal interface. The top navigation bar includes links for Home, Recipient, Appointments, Locations, Bulk Registration, Vaccine Inventory, Vaccine Marketplace, Shipments, and More. Below the navigation bar is a search bar labeled "Scan or type a barcode" and a row of buttons: Add, Waste, Insufficient Quantity, Inbound Transfer (highlighted with a red box), and Outbound Transfer. Below the buttons is a section for Vaccine Inventories, with a dropdown menu showing "All Vaccine Inventories" (also highlighted with a red box). Below this is a table of vaccine inventory items. The table has columns for Vaccine Name, Account, Product, To, Dose, Dose, Expiration Date, Date Added, Lot, Status, Usage, and Create Date. The first row shows a vaccine named "111Deliv..." with a status of "Complete".

Vac...	↑ ↓	Accou...	↓	Prod...	↓	To...	↓	D...	↓	D...	↓	Expira...	↓	Date a...	↓	Lot	↓	Status	↓	Usage ...	↓	Create...	↓
1		111Deliv...		Clinic AB...		Pfizer-Bi...		1		0		0		1/15/202...		1/15/202...		1		Complete		1/15/202...	

Step 2 of 4: Select the Vaccine Inventory Record

On the **INBOUND TRANSFER PAGE**, you will see **VACCINE INVENTORY** Records that are incoming redistributions/transfers to your location. You will be able to select the inbound transfer you are ready to process and add it to your inventory.

1. Select the correct **VACCINE INVENTORY** Record
2. Click **NEXT**

Audience

Healthcare
Location Manager

Tips

Identify Vaccine Inventory Records for inbound redistribution/transfer.

Home Recipient Appointments Locations Bulk Registration Vaccine Inventory Vaccine Marketplace Shipments More ▾

Previous

Please select the incoming vaccine transfer for which you are confirming receipt.

Vaccine Inventory Name ▾	Product ID ▾	Account Name ▾	Status ▾	Incoming Transfer Doses ▾	Serial Number ▾
<input type="radio"/> Delivery 12/19/2020	Pfizer-BioNTech (195 MDV) COVI...	Quality Hospital (Location 1)	Incoming Transfer in Transit	100	

Next

Step 3 of 4: Complete the Inbound Transfer form

Once you select the Vaccine Inventory Record, you will see the Vaccine Inventory details pre-populated. You will want to provide the **DOSES RECEIVED** and **DATE RECEIVED**.

After clicking next, your inventory levels will update, and the inbound redistribution/transfer is now processed.

1. Enter the **DATE RECEIVED**
2. Enter the **DOSES RECEIVED**
3. Click **NEXT**

The screenshot shows a web application interface for managing vaccine inventory. At the top is a navigation bar with links: Home, Recipient, Appointments, Locations, Bulk Registration, Vaccine Inventory (active), Vaccine Marketplace, Shipments, and More. A 'Previous' button is in the top right. The main content area displays pre-populated information: Name: Delivery 12/19/2020, Product Name: Pfizer-BioNTech (195 MDV) COVID-19 Vaccine, NDC #: , Lot: 123456745, Expiration Date: 12/19/2021, 12:00 PM, Serial Number: , and Account: Quality Hospital (Location 1). Below this, a red box highlights two input fields: '* Date Received' with a date picker set to 'Dec 21, 2020' and '* Doses Received' with a text input set to '100'. Below these is the text 'Incoming Doses Quantity : 100'. At the bottom right, another red box highlights the 'Next' button, with a 'Previous' button next to it.

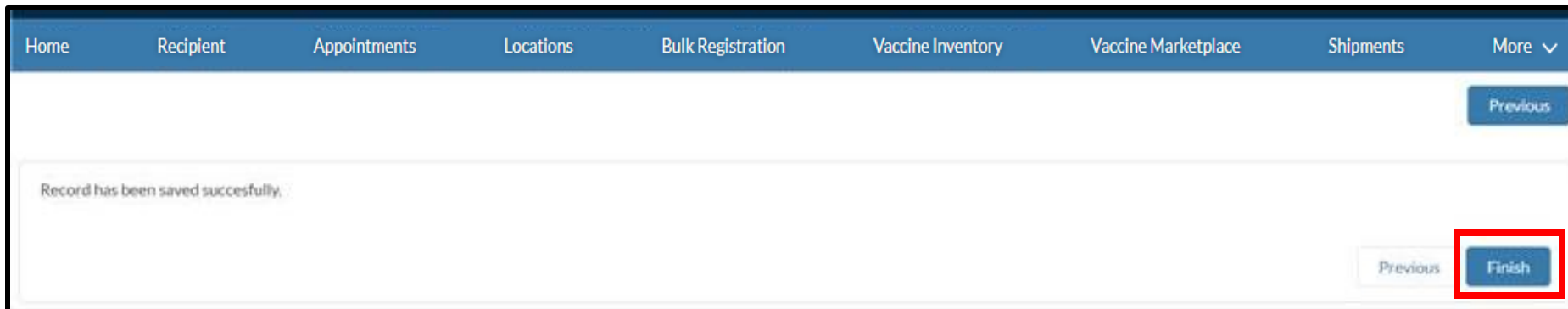
Audience

Healthcare
Location Manager

Step 4 of 4: Complete the Inbound Transfer form

After clicking next, your inbound redistribution/transfer is processed and added to your inventory.

1. Click **FINISH**



The screenshot shows a web application interface with a blue navigation bar at the top containing the following links: Home, Recipient, Appointments, Locations, Bulk Registration, Vaccine Inventory, Vaccine Marketplace, Shipments, and More (with a dropdown arrow). Below the navigation bar, there is a confirmation message: "Record has been saved successfully." In the bottom right corner of the main content area, there are two buttons: "Previous" and "Finish". The "Finish" button is highlighted with a red rectangular border, indicating it is the next step to be clicked.

Audience

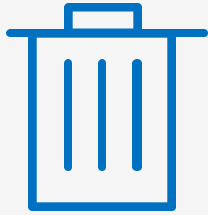
Healthcare
Location Manager

Tips

Complete the inbound transfer form by clicking Finish.

Document Vaccine Inventory Depreciation

When to declare in CVMS a COVID-19 Vaccine Inventory Deprecation



When a COVID-19 vaccine is wasted

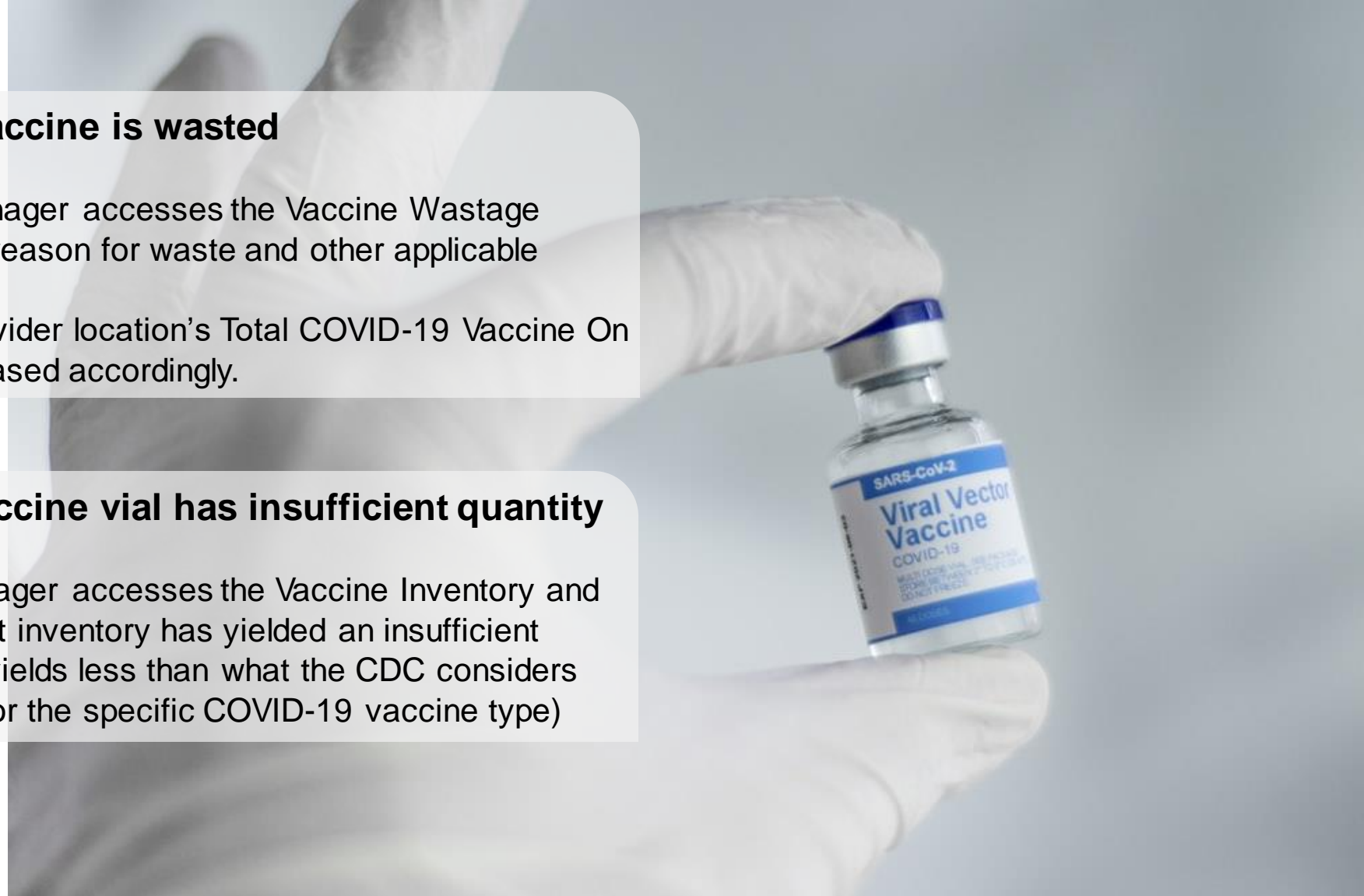
Healthcare Location Manager accesses the Vaccine Wastage Survey Form, providing reason for waste and other applicable information.

Once submitted, the provider location's Total COVID-19 Vaccine On Hand Inventory is decreased accordingly.



When a COVID-19 vaccine vial has insufficient quantity

Healthcare Location Manager accesses the Vaccine Inventory and inputs that a vial from that inventory has yielded an insufficient quantity (any time a vial yields less than what the CDC considers standard doses per vial for the specific COVID-19 vaccine type)



Log a Vaccine Wastage

Step 1 of 5: Navigate to the Vaccine Inventory tab

To comply with the CDC's COVID-19 vaccine inventory management guidelines, you will want to document **ALL CASES** of **COVID-19 VACCINE WASTAGE** events for all COVID-19 Vaccine Types in the CVMS Provider Portal. Accurately tracking COVID-19 Vaccine Wastage will also help you maintain an accurate view of COVID-19 vaccine inventory levels for the location(s) that you support.

Remember, examples of COVID-19 Vaccine Wastage include breaking vial/syringe and lost COVID-19 vaccines.

1. At the top of your home page, locate the tab **VACCINE INVENTORY**
2. Click **VACCINE INVENTORY**
3. After clicking **VACCINE INVENTORY**, you will be directed to the **VACCINE INVENTORY TAB**

Audience

Healthcare
Location Manager



Home Recipient Appointments Locations Bulk Registration **Vaccine Inventory** Vaccine Marketplace Shipments More ▾

Step 2 of 5: Open the Vaccine Wastage Survey form

At the top of the page, you will see the different actions you can take to manage your COVID-19 vaccine inventory. The **ALL VACCINES LIST VIEW** will be displayed by default to help you review your COVID-19 Vaccine Inventory Records.


- 1. Click **WASTE** at the top of the page
- 2. After clicking **WASTE**, you will be directed to the **VACCINE WASTAGE SURVEY FORM**

Audience

Healthcare
Location Manager

Tips

To see more details for a specific Vaccine Inventory Record, click the Vaccine Inventory Hyperlink.



Home

Recipient

Appointments

Locations

Bulk Registration

Vaccine Inventory

Vaccine Marketplace

Shipments

More

Scan or type a barcode

Add

Waste

Insufficient Quantity

Inbound Transfer

Outbound Transfer

Vaccine Inventories

All Vaccine Inventories

50+ items • Sorted by Vaccine Inventory Name • Filtered by All vaccine inventories • Updated a few seconds ago

Search this list...

Settings

Table

Refresh

Print

Filter

	Vac...	Accou...	Prod...	To...	D...	D...	Expira...	Date a...	Lot	Status	Usage ...	Create...
1	111Deliv...	Clinic AB...	Pfizer-Bi...	1	0	0	1/15/202...	1/15/202...	1	Complete		1/15/202...

Step 3 of 5: Select the Correct Vaccine Inventory Record

On this page, you will be directed to select **ONE OR MORE** Vaccine Inventory Records to report waste. At the bottom, you will see **ALL WASTAGE EVENTS** displaying all previously recorded COVID-19 vaccine inventory waste.

- 1. Check the **BOX** for the **APPROPRIATE ROW(S)**
- 2. Click **NEXT** at the bottom of the page
- 3. After clicking **NEXT**, you will see the **VACCINE WASTAGE SURVEY FORM**

HomeRecipientAppointmentsLocationsBulk RegistrationVaccine InventoryVaccine MarketplaceShipmentsMore

Previous

Report Waste

Please select the vaccines for which you would like to report a wastage event. The information will only have to be entered once for all vaccines selected.

<input type="checkbox"/>	Vaccine Inventory... ▾	Product Name ▾	Account Name ▾	Status ▾	Doses Available ▾	Serial Number ▾	Lot ▾
<input type="checkbox"/>	Delivery 12/02/2020 - v2	Pfizer-BioNTech (195 ...	CreekSide Clinic Main ...	Available	77	31415926535	LT-23451
<input type="checkbox"/>	Delivery 12/02/2020	Pfizer-BioNTech (195 ...	CreekSide Clinic Main ...	Available	0	1123581321	LT-12345
<input checked="" type="checkbox"/>	Delivery 12/04/2020	Pfizer-BioNTech (195 ...	CreekSide Clinic Main ...	Available	140	2468101214	LT-02241989
<input type="checkbox"/>	E2E Testing			Available	186	90	90

Next

Audience

Healthcare
Location Manager

Tips

You will be able to report a Partial or Full Vaccine shipment wastage on the next page.

Step 4 of 5: Complete the Vaccine Wastage Survey form

Report Waste

* Date Wastage Occurred
Jul 1, 2021

* Doses Wasted

☐ Entire vaccine inventory wasted

* Reason for Waste
None

Description

* Reason for Waste

None

None

Broken Vial/syringe

Expired Vaccine

Failure to store properly upon receipt

Lost or unaccounted for vaccine

Mechanical failure

Natural disaster/power outage

Open vial but all doses not administered

Recall

Storage Unit too cold

Storage Unit too warm

Vaccine drawn into syringe but not administered

Vaccine spoiled in transit(Freeze/Warm)

Other

1. Populate the required **REPORT WASTE FIELDS**:

1. Date Wastage Occurred
 2. Doses Wasted
 3. If you want to report the entire Vaccine Inventory wasted, check the Entire Vaccine Inventory Wasted Checkbox.
 4. Reason for Waste
- ### 2. You may populate the **OPTIONAL FIELDS** if desired
3. Before submitting the form, **CONFIRM** that all entered details are correct
 4. Once you are ready to submit the form, click **NEXT**
 5. After clicking **NEXT**, you will be directed to the **CONFIRMATION PAGE**

Audience

Healthcare
Location Manager

Tips

If an inventory reaches expiration, you can check **ENTIRE VACCINE INVENTORY WASTED** then select **EXPIRED VACCINE** from the dropdown. This will change your available doses to zero.

Step 5 of 5: Submit the Vaccine Wastage Survey form

The **VACCINE WASTAGE RECORD** is now submitted, and your COVID-19 Vaccine Inventory Record will be automatically updated.

1. Click **FINISH**
2. After clicking **FINISH**, you will be directed back to the **INITIAL VACCINE WASTAGE SURVEY FORM PAGE**



Home Recipient Appointments Locations Bulk Registration Vaccine Inventory Vaccine Marketplace Shipments More ▾

Previous

Report Waste

Wastage event for the chosen vaccines have been created.

Finish

Audience

Healthcare
Location Manager

Tips

After clicking **FINISH**, you will see your Vaccine Wastage Record displayed on the All Wastage List View.

Log Insufficient Quantity

Step 1 of 5: Navigate to the Vaccine Inventory tab

To comply with the CDC's COVID-19 Vaccine Inventory Management Guidelines, you will want to document **ALL CASES** of **COVID-19 VACCINE INSUFFICIENT QUANTITY** events for all COVID-19 Vaccine Types in the CVMS Provider Portal. Accurately tracking COVID-19 Vaccine Insufficient Quantity will also help you maintain an accurate view of COVID-19 vaccine inventory levels for the location(s) that you support.

Remember, examples of COVID-19 Insufficient Quantity events include any time less than the CDC standard doses are obtained from a vial for that specific vaccine manufacturer.

1. At the top of your home page, locate the tab **VACCINE INVENTORY**
2. Click **VACCINE INVENTORY**
3. After clicking **VACCINE INVENTORY**, you will be directed to the **VACCINE INVENTORY TAB**

Audience

Healthcare
Location Manager



Home Recipient Appointments Locations Bulk Registration **Vaccine Inventory** Vaccine Marketplace Shipments More ▾

Step 2 of 5: Click Insufficient Quantity at the top of the page

At the top of the page, you will see the different actions you can take to manage your COVID-19 Vaccine Inventory Records. The **ALL VACCINE INVENTORY LIST VIEW** will be displayed by default to help you review your COVID-19 Vaccine Inventory Records.

To record an Insufficient Quantity event:

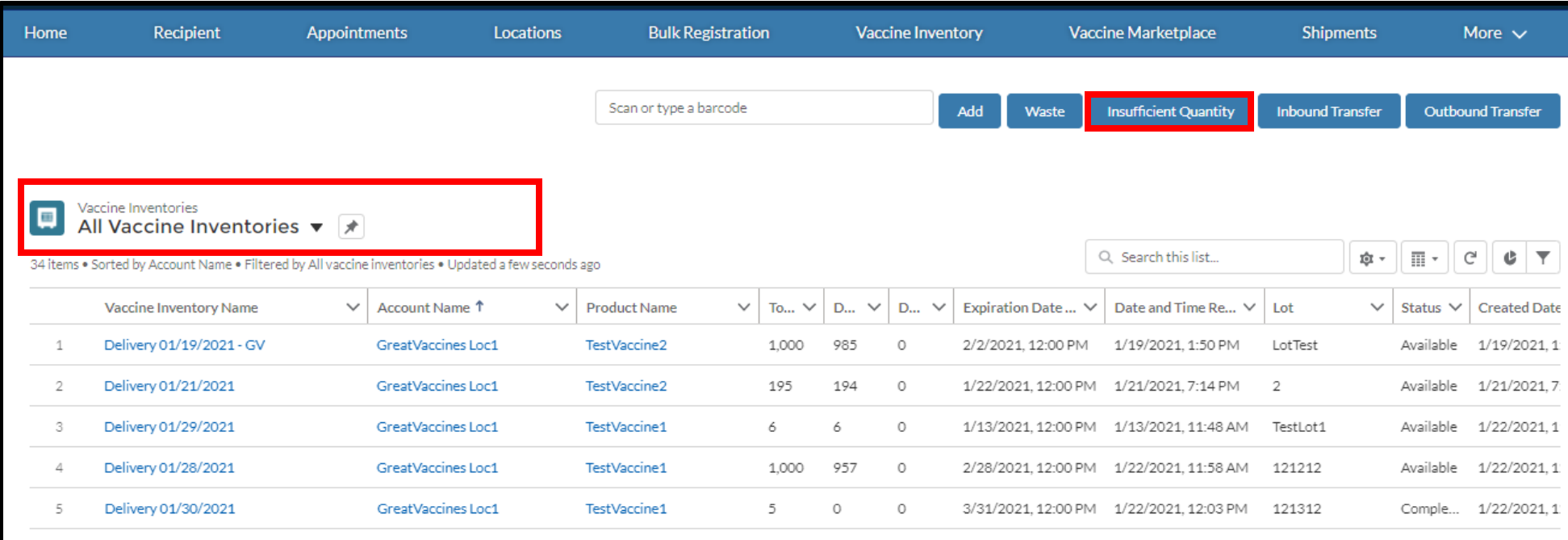
1. Click **INSUFFICIENT QUANTITY** at the top of the page
2. After clicking **INSUFFICIENT QUANTITY**, you will be directed to the **VACCINE INSUFFICIENT QUANTITY** page

Audience

Healthcare
Location Manager

Tips

To see more details for a specific Vaccine Inventory Record, click the Vaccine Inventory hyperlink.



The screenshot shows the top navigation bar with links: Home, Recipient, Appointments, Locations, Bulk Registration, Vaccine Inventory, Vaccine Marketplace, Shipments, and More. Below the navigation bar is a search bar and a row of action buttons: Add, Waste, Insufficient Quantity (highlighted with a red box), Inbound Transfer, and Outbound Transfer. Below the buttons is a section titled 'Vaccine Inventories' with a dropdown menu 'All Vaccine Inventories' (highlighted with a red box) and a search bar. Below this is a table with 12 columns: Vaccine Inventory Name, Account Name, Product Name, To..., D..., D..., Expiration Date..., Date and Time Re..., Lot, Status, and Created Date. The table contains 5 rows of data.

	Vaccine Inventory Name	Account Name	Product Name	To...	D...	D...	Expiration Date...	Date and Time Re...	Lot	Status	Created Date
1	Delivery 01/19/2021 - GV	GreatVaccines Loc1	TestVaccine2	1,000	985	0	2/2/2021, 12:00 PM	1/19/2021, 1:50 PM	LotTest	Available	1/19/2021, 1
2	Delivery 01/21/2021	GreatVaccines Loc1	TestVaccine2	195	194	0	1/22/2021, 12:00 PM	1/21/2021, 7:14 PM	2	Available	1/21/2021, 7
3	Delivery 01/29/2021	GreatVaccines Loc1	TestVaccine1	6	6	0	1/13/2021, 12:00 PM	1/13/2021, 11:48 AM	TestLot1	Available	1/22/2021, 1
4	Delivery 01/28/2021	GreatVaccines Loc1	TestVaccine1	1,000	957	0	2/28/2021, 12:00 PM	1/22/2021, 11:58 AM	121212	Available	1/22/2021, 1
5	Delivery 01/30/2021	GreatVaccines Loc1	TestVaccine1	5	0	0	3/31/2021, 12:00 PM	1/22/2021, 12:03 PM	121312	Comple...	1/22/2021, 1

Step 3 of 5: Find the appropriate vaccine(s) on the list

Once you are directed to the **VACCINE INSUFFICIENT QUANTITY** page, you will be directed to select **ONE OR MORE** Vaccine Inventory Records to report an insufficient quantity.

- 1. Check the **BOX** for the appropriate **VACCINE INVENTORIES**
- 2. Click **NEXT** at the bottom of the page
- 3. After clicking **NEXT**, you will see the **VACCINE INSUFFICIENT QUANTITY SURVEY FORM**

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Tips

You will only be able to record insufficient quantity events for the same vaccine product if you choose to select more than one Vaccine Inventory Record.

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Vaccine Insufficient Quantity

Please select the vaccines for which you would like to create an insufficient quantity event. The information will only have to be entered once for all vaccines selected.

<input type="checkbox"/>	Vaccine Inventory Name	Product Name
<input type="checkbox"/>	Grace Moderna First Dose Inventory	Moderna (10 MDV) COVID-19 Va...
<input type="checkbox"/>	Grace Pfizer 4.1 Inventory	Pfizer-BioNTech (6 doses/vial) (19...
<input type="checkbox"/>	Delivery 01/15/2021	Pfizer-BioNTech (5 doses/vial) (19...
<input type="checkbox"/>	New Grace Pfizer BioTech Inventory for testing abcdef	TestVaccine1
<input type="checkbox"/>	Pfizer 6doses Delivery 02/10/2021	Pfizer-BioNTech (6 doses/vial) (19...
<input type="checkbox"/>	Delivery 01/26/2021	Pfizer-BioNTech (5 doses/vial) (19...
<input checked="" type="checkbox"/>	Lot 1234567	Pfizer-BioNTech (5 doses/vial) (19...
<input type="checkbox"/>	P4 1 release inventory	Pfizer-BioNTech (25 MDV) COVID...

Next

Step 4 of 5: Complete the Vaccine Insufficient Quantity Survey form

1. Populate the required **REPORT INSUFFICIENT QUANTITY FIELDS**:
 1. Insufficient Quantity Date
 2. Doses Insufficient Quantity
 3. Select the appropriate reason from the drop-down
2. You may populate the **OPTIONAL FIELDS** if desired
3. Before submitting the form, **CONFIRM** that all entered details are correct
4. Once you are ready to submit the form, click **NEXT**
5. After clicking **NEXT**, you will be directed to the **CONFIRMATION PAGE**

Audience

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Tips

For **Doses Insufficient Quantity**, select the number of doses missing from each vial.

Vaccine Insufficient Quantity

* Insufficient Quantity Date

Feb 11, 2021

* Doses Insufficient Quantity

1

* Reason for Insufficient Quantity

Other

Reason for Insufficient Quantity - Other

Vial was not completely full

Previous Next

Step 5 of 5: Submit the Vaccine Insufficient Quantity Survey form

The **VACCINE INSUFFICIENT QUANTITY RECORD** is now submitted, and your COVID-19 Vaccine Inventory Records will be automatically updated.

- 1. Click **FINISH**
- 2. After you click **FINISH**, you will see the Vaccine Insufficient Quantity record displayed on the **ALL INSUFFICIENT QUANTITIES LIST VIEW**

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Vaccine Insufficient Quantity

Insufficient quantity event for the chosen vaccines have been created.

Finish

Insufficient Quantities

All Insufficient Quantities

48 items • Sorted by Created Date • Filtered by All insufficient quantities • Updated 2 minutes ago

Search this list...

Settings

Table

Refresh

Print

Filter

	Insufficient ...	Vaccine Inventory	Insuffic...	Dos...	Reason for Insufficient Quantity	Reason for Insufficient Quantity - ...	Created Date
1	INSUFF-00097	Delivery 02/12/2021	2/15/2021	1	Moderna (9 doses obtained from vial, expected 10)		2/15/2021, 11:29 AM
2	INSUFF-00096	Grace Moderna First Dose Inventory	2/15/2021	1	Moderna (9 doses obtained from vial, expected 10)		2/15/2021, 11:29 AM

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Tips

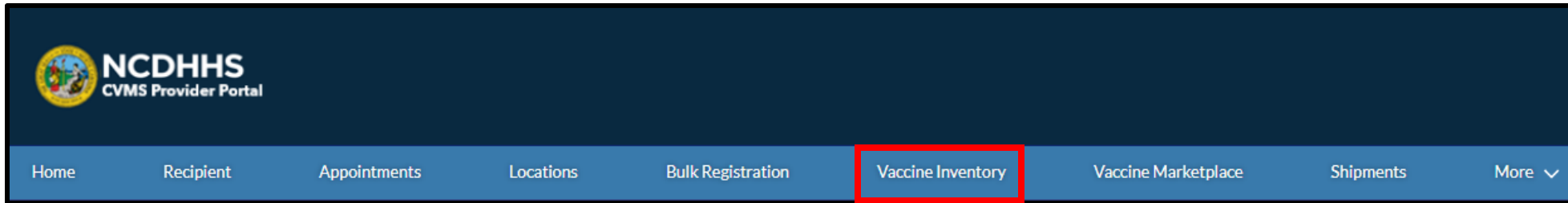
After clicking **FINISH**, you will see your Vaccine Insufficient Quantity record displayed on the **All Insufficient Quantities List View**.

Edit Deprecation Events

Step 1 of 4: Navigate to the Vaccine Inventory tab

In the event that a deprecation event was incorrectly entered, the event record can be edited to reflect the corrected information.

1. At the top of your home page, locate the tab **VACCINE INVENTORY**
2. Click **VACCINE INVENTORY**
3. After clicking **VACCINE INVENTORY**, you will be directed to the **VACCINE INVENTORY TAB**



Audience

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Tips

The process for editing both Wastage and Insufficient Quantities is identical.

Step 2 of 4: Select the Vaccine Inventory to be Corrected

1. Search the list
2. Select the Vaccine Record to edit

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Scan or type a barcode

Add

Waste

Insufficient Quantity

Inbound Transfer

Outbound Transfer

Vaccine Inventories

All Vaccine Inventories

29 items

Sorted by Vaccine Inventory Name


Filtered by All vaccine inventories

Updated a few seconds ago

Search this list...

	Vaccine I...	NDC (Prod...	Account Na...	Product N...	Lot	To...	Dos...	D...	Ex...	Do...	Status	Expiration ...	Date Recei...	Created Da...	
1	1000 Additional	59267-1000-02	TestLoc_UAT1	Pfizer-BioNTe...	pf10000	10,000	9,999	2	1	0	Available	5/31/2021, 12:...	5/10/2021, 4:2...	5/10/2021, 4:2...	
2	111111 Delive...	80777-0273-99	TestLoc_UAT1	Moderna (10 ...	111111	100	0	0		100	Complete	7/31/2021, 12:...	6/23/2021, 2:1...	6/23/2021, 2:1...	
3	CheckSameOr...	59267-1000-02	TestLoc_UAT1	Pfizer-BioNTe...	11	100	4	0		0	Available	9/30/2021, 12:...	6/25/2021, 4:3...	6/25/2021, 4:3...	
4	Delivery 05/12...	59267-1000-02	TestLoc_UAT1	Pfizer-BioNTe...	PF27521	1,170	1,155	1		14	Available	9/24/2021, 12:...	5/12/2021, 12:...	5/12/2021, 12:...	
5	Delivery 06/11...	59267-1000-02	Training Team ...	Pfizer-BioNTe...	1234567	0	0	0	0	0	Incoming Trans...	1/1/2022, 12:0...		6/11/2021, 11:...	
6	Delivery 06/24...	22222-222-22	Training Team ...	TestVaccine2 (...	1	100	0	2		98	Wasted	6/30/2021, 12:...	6/24/2021, 6:1...	6/24/2021, 6:1...	
7	Delivery 06/25...	80777-0273-99	TestLoc_UAT1	Moderna (10 ...	11	60	40	0	0	0	Available	9/16/2021, 12:...	6/25/2021, 12:...	6/25/2021, 4:3...	
8	EHR Vaccine	59267-1000-03	TestLoc_UAT1	Pfizer-BioNTe...	10021	100	91	9		0	Available	10/14/2021, 1:...	6/17/2021, 12:...	6/17/2021, 1:0...	
9	FED Test3 06/25	80777-0273-99	TestLoc_UAT1	Moderna (10 ...	1231	40	40	0		0	Available	10/13/2021, 1:...	6/25/2021, 11:...	6/25/2021, 11:...	
10	FED-Mod Test	80777-0273-99	TestLoc_UAT1	Moderna (10 ...	Mod112	50	50	0		0	Available	7/31/2021, 12:...	6/28/2021, 11:...	6/28/2021, 11:...	


Step 3 of 4: Navigate to the Related Tab

 Vaccine Inventory
111111 Delivery 06/23/2021


Account	Total Doses	Doses Available	Doses Administered	Doses Wasted	Doses Insufficient Quantity
TestLoc_UAT1	100	0	0	100	0


DETAILS

RELATED


 Orders (0)


New

 Appointments (0)

 Wastage Events (1)


New

Wastage ID	Doses Wasted	Date Wastage Occurred	Reason for Waste	
WAST-002645	100	6/23/2021	Broken Vial/syringe	
				View All

 Insufficient Quantities (0)

New

Edit

1. From the Vaccine Inventory record, navigate to the **RELATED** Tab
2. Find the deprecation event to edit (under **WASTAGE EVENTS** or **INSUFFICIENT QUANTITIES**)
3. Navigate to the Action Arrow  and click **EDIT**

Audience

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Tips

New deprecation events can also be created by clicking **NEW**.

Step 4 of 4: Complete the Edit

1. Complete the edit(s)
2. Click **SAVE**

Edit WAST-002645

Information

Wastage ID

WAST-002645

Account (Location) Name

TestLoc_UAT1

* Date Wastage Occurred

6/23/2021

Doses Wasted

100

Entire vaccine inventory wasted

☐

* Reason for Waste

Broken Vial/syringe

Vaccine Inventory

111111 Delivery 06/23/2021

Associated Vial Serial No.(s)

Description

System Information

Created By

Darrell Lee, 6/23/2021, 2:15 PM

Last Modified By

Darrell Lee, 6/23/2021, 2:15 PM

Cancel

Save & New

Save

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Appendix

Key Terms

Wastage

Wastage is the sum of COVID-19 vaccines discarded, lost, damaged, or destroyed.

Transfer

Transfer is the unplanned and unscheduled movement of inventory between two enrolled sites (move inventory between those who have vaccine to those who do not).

Spoilage

Spoilage happens when a COVID-19 vaccine dose is no longer eligible for administration to an individual due to exposure to inappropriate conditions.

Vaccine Deprecation

Vaccine Deprecation represents the process in which the number of COVID-19 vaccines is reduced by the number of COVID-19 vaccines administered, wasted, or considered insufficient.

Vaccine Inventory Shipment Details

Vaccine Inventory Shipment Details may include manufacturer name, lot number, serial number, and National Drug Code (NDC).

Redistribution



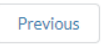


Redistribution is the planned and scheduled movement of inventory between two enrolled sites within the same organization with an approved redistribution agreement.

Insufficient Quantity

COVID-19 Insufficient Quantity events include any time less than what the CDC considers standard doses per vial for the specific COVID-19 vaccine type are able to be administered to recipients.

Additional Notes

Key Items:

- **Hyperlinks** appear as light blue and will provide additional information or navigation.
- *** Asterisks** are used to denote required information.
-  A Toggle can be clicked to see selectable options.
-  A Pen can be clicked to make edits to the field.
-   Navigation Buttons can be clicked on to progress to the “next” or the “previous” step in a task.
-  A Pause button can be clicked if you wish to step away / and return to your form later. You will be prompted to review your previously entered data upon your return / login.

Supported Web Browsers:

- Please use the latest version of Chrome, Firefox, Edge Chromium, or Safari browsers to access CVMS
- For more information on supported browsers, see https://help.salesforce.com/articleView?id=getstart_browsers_sfx.htm&type=5
- Note: Internet Explorer and Edge (non-Chromium) browsers are not compatible with CVMS

User Guide Change Log

Version	Date of Change	Changes Made	Impacted Slides	Author
1	12/21/2020	<ul style="list-style-type: none"> Initial document 		Azalea Troche
2	1/10/2021	<ul style="list-style-type: none"> Removed any mention of the 2 CVMS Vaccine Support emails. Added CVMS Hep Desk Portal information 	1, 2, 7, 11, 15, 22, 35	Courtney Seward
3	1/13/2021	<ul style="list-style-type: none"> Added a new screenshot of the new redistribution/transfer form and took out the TIP in slide 21. The CVMS Help Desk Portal screenshot was also added. 	1, 22, 23	Courtney Seward
4	1/17/2021	<ul style="list-style-type: none"> Updated navigation bar. Updated the terms for Redistribution and Transfer 	6	Azalea Troche & Courtney Seward
5	1/21/2021	<ul style="list-style-type: none"> Added a TIP 	22	Courtney Seward & Linda Wade
6	1/27/2021	<ul style="list-style-type: none"> Updated Navigation Bar screen shots to show reports tab 	5-35	Kristin Clark
7	2/4/2021	<ul style="list-style-type: none"> Updated CVMS Help Desk Portal Screenshot 	22, 23	Courtney Seward
8	2/15/2021	<ul style="list-style-type: none"> Added Insufficient Quantity Definitions Added Insufficient Quantity Section Rewrote Inventory Transfer to match 4.1 Release methodology Updated screenshots to match new branding 	6, 7, 14-19, 25-38	Tabitha McKelvy Steve DiGangi Nicholas Rinz
9	3/2/2021	<ul style="list-style-type: none"> Updated wording for Jansen Vaccine 	9, 15	Nicholas M. Rinz
10	3/10/2021	<ul style="list-style-type: none"> Updated screenshots 	All	Nicholas M. Rinz
11	04/26/2021	<ul style="list-style-type: none"> Updated screenshot to include "Location" menu Added tip to do separate transfers for 1st and 2nd doses; 2nd dose should follow in approximately 3 weeks Updated Step 7 to include 1st or 2nd dose to reason; updated screenshot to show example Added continuation slide for Change Log 	23, 24, 25, 43	Darrell Lee
12	05/14/2021	<ul style="list-style-type: none"> Removed references to 1st and 2nd dose tagging 	24, 25	Darrell Lee

User Guide Change Log (continued)

Version	Date of Change	Changes Made	Author
13	06/11/2021	<ul style="list-style-type: none"> • 5 : Added Vaccine Marketplace to overview • 35, 39: Updated screenshots to include Vaccine Marketplace tab • 6-34: Added Vaccine Marketplace Instructions 	Darrell Lee
14	07/01/2021	<ul style="list-style-type: none"> • 8: Introduced Hubs • 11: Added a step about contacting the Hub • 18: Added auto-update of available inventories • 23-25: Added Additional steps to check listings posted by the assigned hub • 10-28: Updated screenshots • 33-36: Added Finding Associated Hub • 38: Added the 3 rules that will make a listing auto-lapse • 68: Updated new wastage drop-down and added tip 	Darrell Lee
15	07/15/2021	<ul style="list-style-type: none"> • 8: Updated Hubs • 10-13: Moved from end of section to beginning • 18-19: Updated screenshots • 24-25: Added step for viewing inquiries • 27: Added step for Inactivation Reason • 36-37: Added step for Creating an Inquiry • 43: Added step for Inactivation Reason • 84-88: Added Edit Deprecation Event section 	Darrell Lee